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8.4 Processing a HIP Application – Part I

Gender: When referring to the Client, she/herself was used throughout Volume 4, SSM for simplicity. However, both genders, male and female, may receive benefits.

8.4.1 Overview

The Process a HIP Application work instructions describe how staff in the Service Center process applications received from potential or existing HIP Clients. Upon receipt by the Document Center, all HIP applications are scanned and the digital image(s) are stored. The extraction of data is by manual data entry at the Document Center. An Application Case is created in the WFMS for all HIP applications that are received, scanned and data entered at the Document Center. An Application Case is manually created by an Eligibility Associate or Eligibility Specialist in the Service Center only on an exception basis, if there is a problem at the Document Center that prevents keying in of HIP applications.
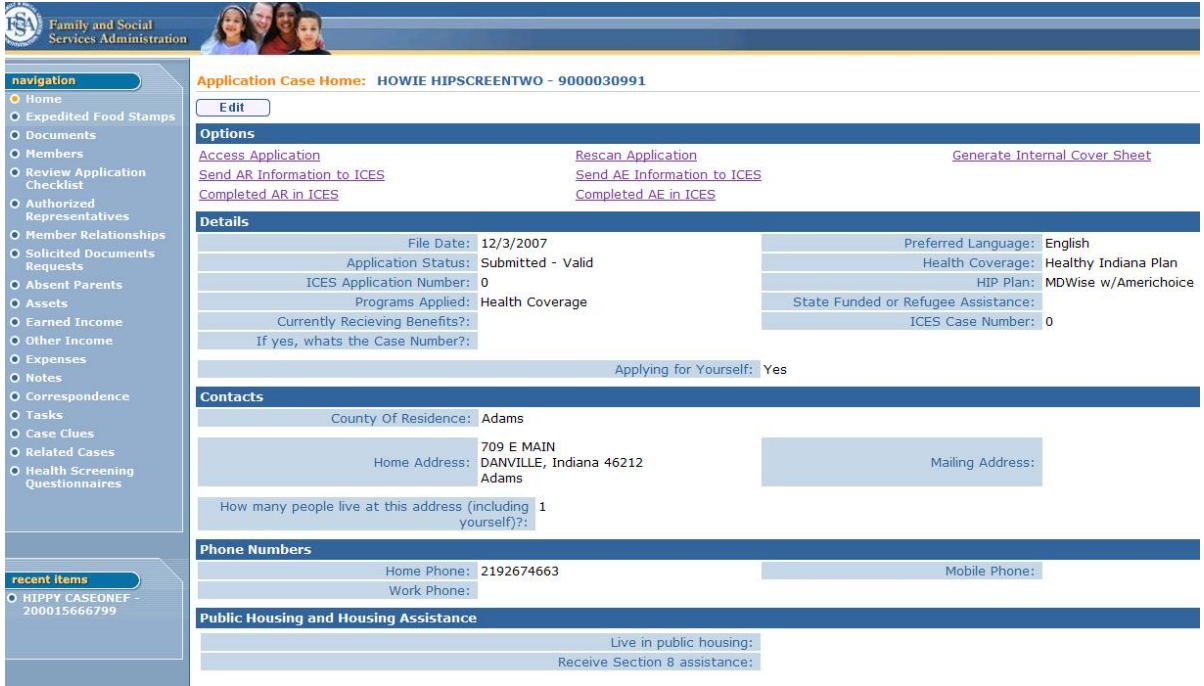
8.4.2 Workgroup Responsibilities

The following workgroups (WG) are responsible for processing the listed application programs for a valid application.

Role	Responsibility
HIP WG 1(Eligibility Associate)	• Eligibility Associates review and register HIP applications in priority order. If documents are legible and the application is valid, the EA file clears the members and registers the case in ICES. This action creates a task for the Eligibility Associate or Specialist assigned to the Process HIP Applications work queue. • A specialized group of Eligibility Associates is responsible for researching invalid new applications. • A specialized group of Eligibility Associates is responsible for processing Out-of-State Inquiry Requests.
HIP WG 2: (Eligibility Associate and Specialist)	Eligibility Associates and Specialists process both initial and Add a Program applications for HIP.

8.4.3 HIP Workgroup 1 Work Instructions

8.4.3.1 New HIP Application Ready for Initial Review

Step	New HIP Application Ready for Initial Review
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task* number. The WFMS displays the Task Home.
2.	View the Subject and Task Instructions. **Task Instructions:** • Conduct initial review of a new HIP application, which includes the review of the scanned document for legibility and correct scanning of data, as well as determination of the validity of the application, and completion of the application registration process.

Step	New HIP Application Ready for Initial Review
3.	Under the Supporting Information cluster, click *Case Home Page.* The WFMS displays the Application Case Home page.

Step	New HIP Application Ready for Initial Review
4.	From the Application Case Home page, under the Options cluster, click *Access Application* to access an image of the scanned application.

An image of the application opens in a separate window; leave this window open
alongside WFMS in order to complete the New HIP Application Ready for Initial Review
task.

.
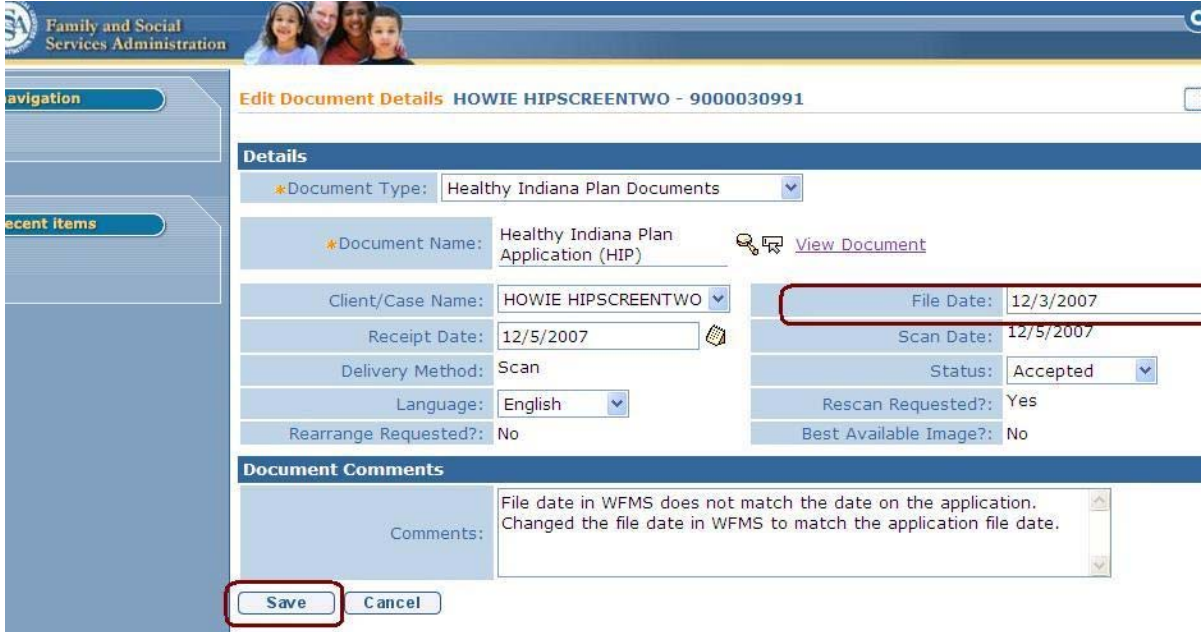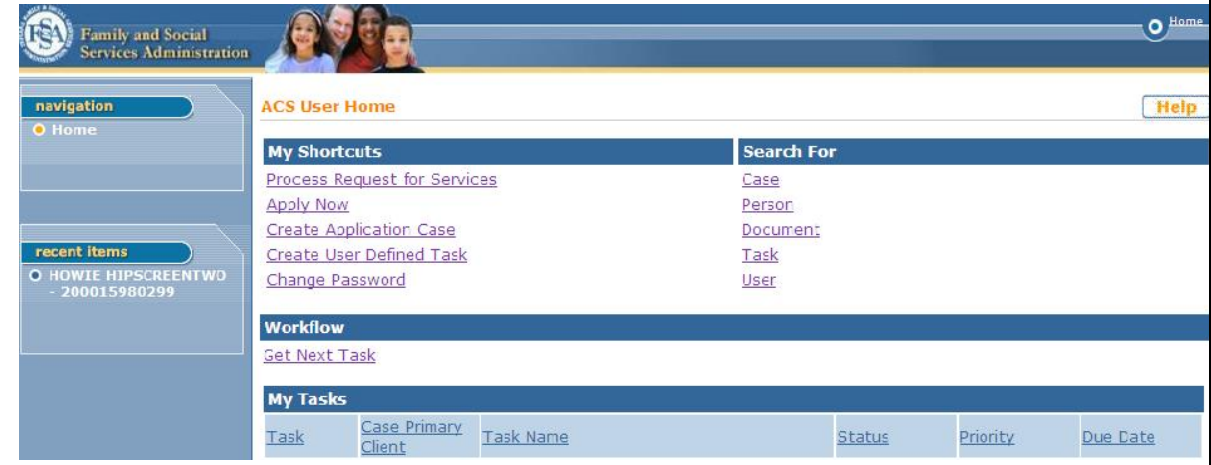
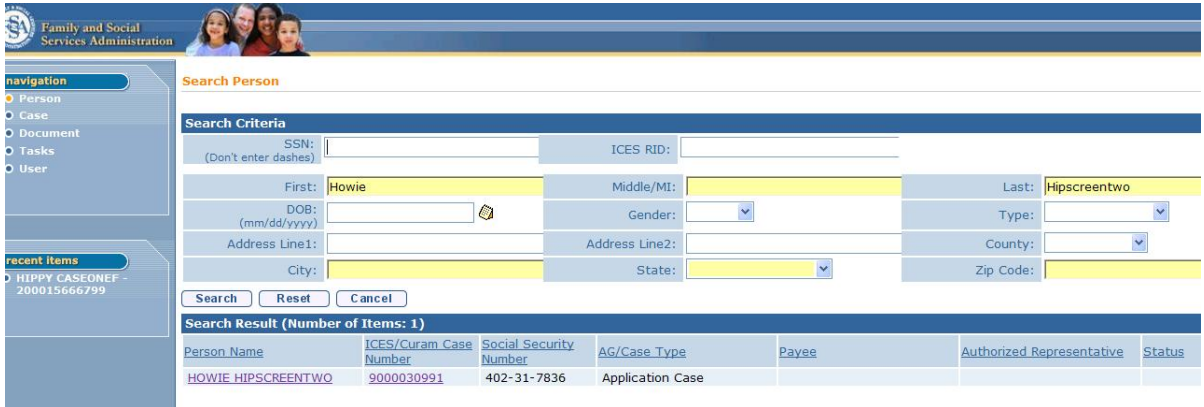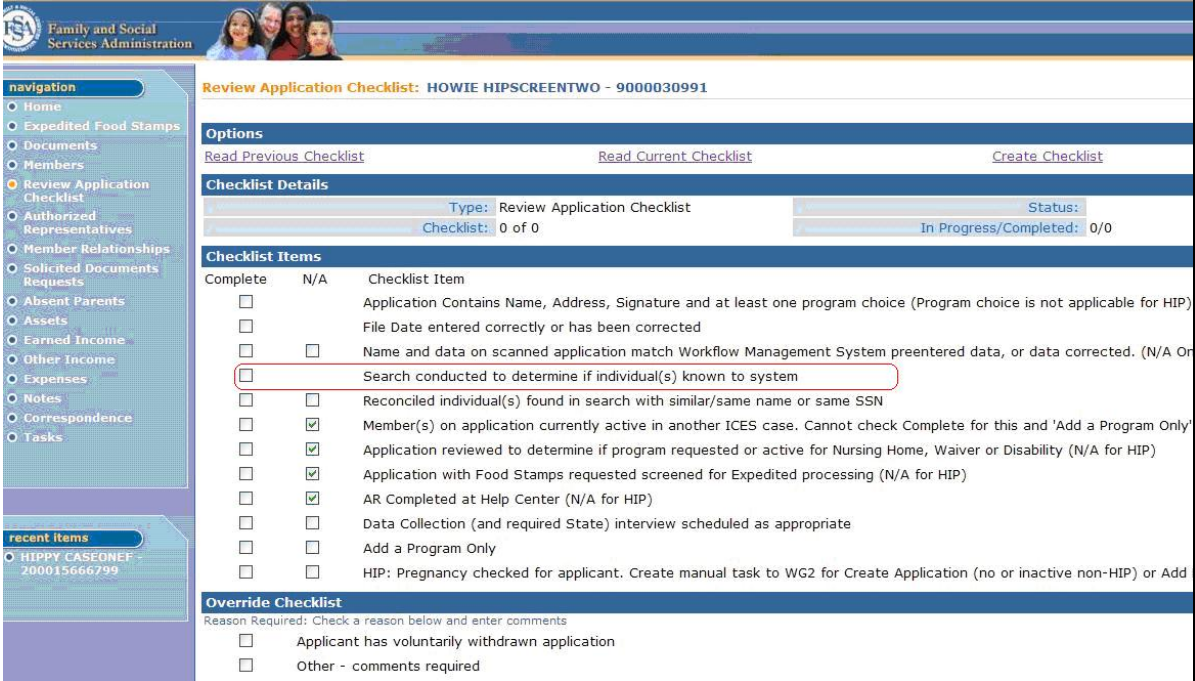| Step	New HIP Application Ready for Initial Review
5.	Review the images of the application to verify the images are legible and in the correct order. • If the image of the application is too light to read, click *Rescan Application* under the Options cluster. Note: a document received by fax cannot be rescanned. *[screen image: Application Case Home: HOWIE HIPSCREENTWO - 9000030991]* navigation ○ Home ○ Expedited Food Stamps ○ Documents ○ Members ○ Review Application Checklist ○ Authorized Representatives ○ Member Relationships ○ Solicited Documents Requests ○ Absent Parents ○ Assets ○ Earned Income ○ Other Income ○ Expenses ○ Notes Options Access Application Rescan Application Generate Internal Cover Sheet Send AR Information to ICES Send AE Information to ICES Completed AR in ICES Completed AE in ICES Details File Date: 12/3/2007 Preferred Language: English Application Status: Submitted - Valid Health Coverage: Healthy Indiana Plan ICES Application Number: 0 HIP Plan: MDWise w/Americhoic Programs Applied: Health Coverage State Funded or Refugee Assistance: Currently Recieving Benefits?: ICES Case Number: 0 If yes, whats the Case Number?: Applying for Yourself: Yes • If the pages of an application are not in the correct order and need to be rearranged, refer to Section 8.4.5.3, Processing a HIP Application WI Part II, Initiate Rearrange Document Task <insert hyperlink>.
6.	a. Review the image of the application to determine if the application is valid according to policy. Valid applications must contain a name, address, and signature. If the applicant's signature is missing, a copy of the application is returned to the applicant with a notice requesting signature. Refer to Section 8.4.3.6 Invalid Application Contains Name and Address but No Signature <insert hyperlink>. If a signature is present but one (or both) of the other items is missing, it may be possible to contact the applicant by telephone to gather the information rather than request the information by mail. Refer to Section 8.4.3.7 Invalid Application Contains Name and Signature but No Address <insert hyperlink>. b. NOTE: When processing an initial application review, WFMS has a character limit on each address line. The address line has a 30 character (including spaces) limit; the city name has a 15 character limit. Abbreviations may be needed to complete the address. Example: If the city name is North Manchester (16 characters), abbreviate to N. Manchester **before** you push to AR. When addresses exceeding the character limit on each line, the case will be in error and you will not be able to complete your task.
7.	Under the Details cluster, compare the file date in the WFMS with the earliest date stamp on the application to verify the file date has been extracted and/or data entered correctly in accordance with policy.

Step	New HIP Application Ready for Initial Review

The file date is the earliest of:

- The date stamped by the State office or Help Center on the application (make sure to check all pages for the date stamp indicating the date of the application).

- The date the application is received via fax at the Document Center.

- The date the application is received via mail at the Document Center.

For HIP applications received from an enrollment center, the file date is the date of receipt at the enrollment center. This is shown at the bottom of page One in the field labeled Date of Application.

- If the file date is not correct, click *Documents* from the left Navigation bar.

- The WFMS displays the Documents page.

- Click *Edit* next to the application.

The WFMS displays the Edit Document Details page.

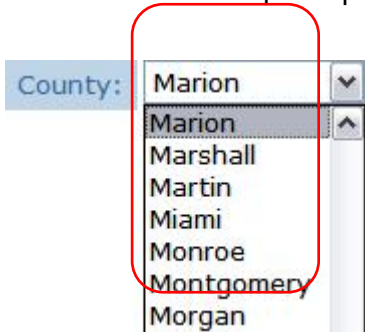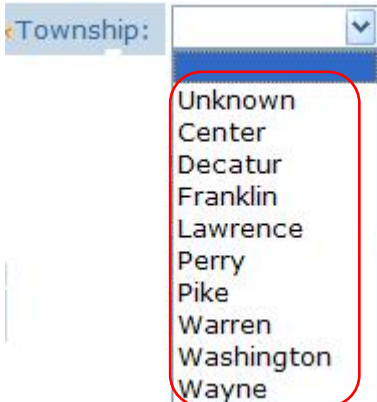- Enter the correct file date on this page. |

Step	New HIP Application Ready for Initial Review
• Be sure to include the reason for modifying the file date in the Case Notes. Example for note: Updated file date to match date stamp from local office/enrollment center.

• Note: For an Application that is valid, change the application status from Received to Accepted in the Edit Document Details page. This will update the status when viewing from the Documents page.

• For an Application that is invalid, refer to work instructions in Sections 8.4.3.6 and 8.4.3.7 Invalid Application <insert hyperlinks>.

• Click *Save*.

The WFMS displays the Application Case Home page. |
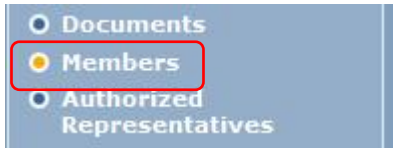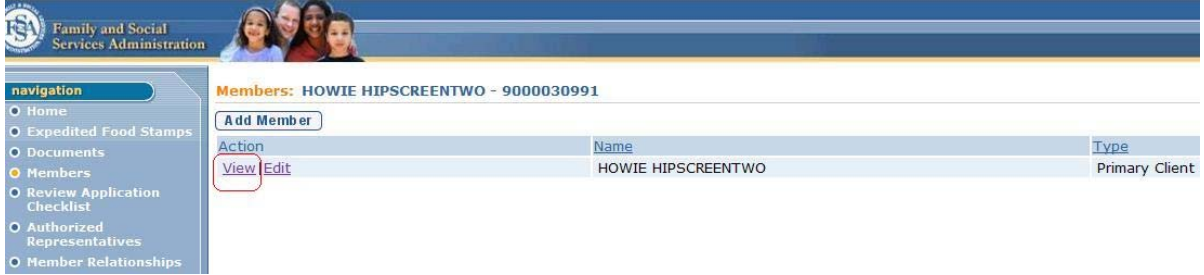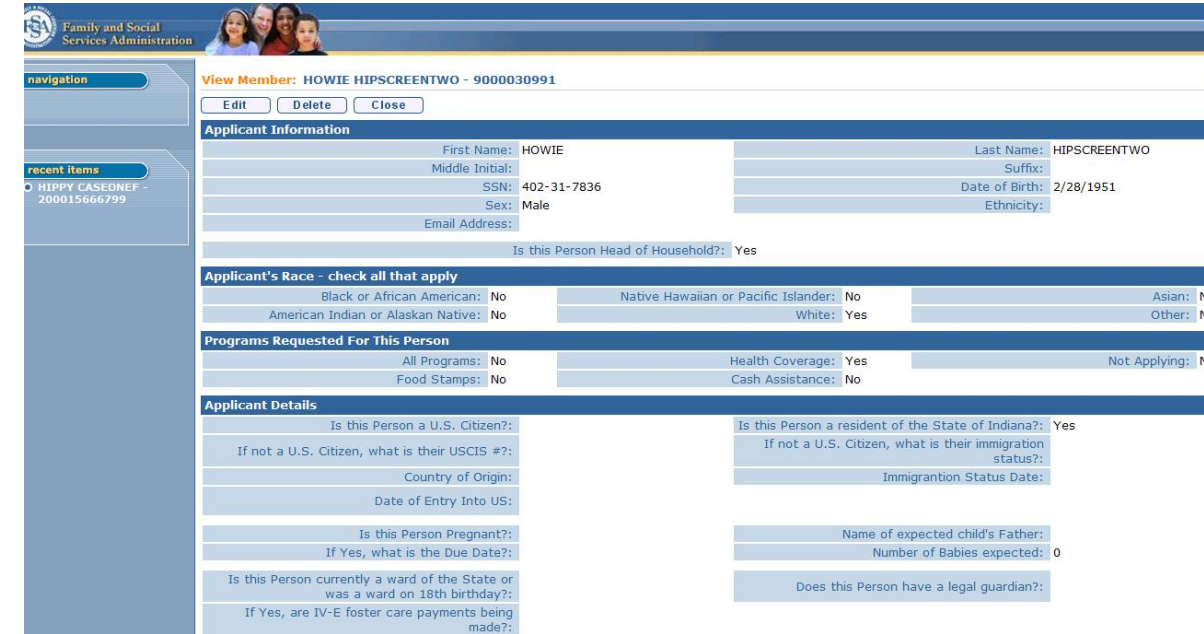
Step	New HIP Application Ready for Initial Review
8.	Click *Home* in the upper right corner. The WFMS displays the User Home page.
9.	Refer to Section 3.11.3, Search Instruction <insert hyperlink> to search by address, household member name(s), and household member SSN(s).
10.	Click *Person* under the Search For cluster. The WFMS displays the Search Person page.
11.	Enter the Search Criteria for household member #1.

Step	New HIP Application Ready for Initial Review
12.	Click *Search*. The WFMS populates the Search Results cluster based on the search criteria entered.

Step	New HIP Application Ready for Initial Review
13.	Review the search results to determine if any of the individuals on the application are in another case with either a pending or open status.

- Click on each case listed in the search results and review the AGs from each Case Home Page.
- If any of the individuals on the application are in another active HIP case, determine whether the application is either an Add a Program or Add a Person application.

    ✓ Add a Program for HIP cases occurs when a member of a household with an active HIP case is not active for HIP and then applies for HIP. Add a Person occurs when an individual without an active HIP case moves into a HIP household and submits an application for HIP. If you identify either of these situations, enter a note in WFMS for review by WG2.

Note: If the individual is in another active or closed case that is not a HIP case, a new ICES case must be created for the HIP application. ICES will not allow entry of the HIP program indicator (H) when the case contains non-HIP assistance groups or non-HIP programs are selected on these screens.

HIP applications cannot be combined with or added to ICES cases containing any non-HIP programs.

- From the Application Case Home page, click *Review Application Checklist* from the left Navigation bar and mark the appropriate box.

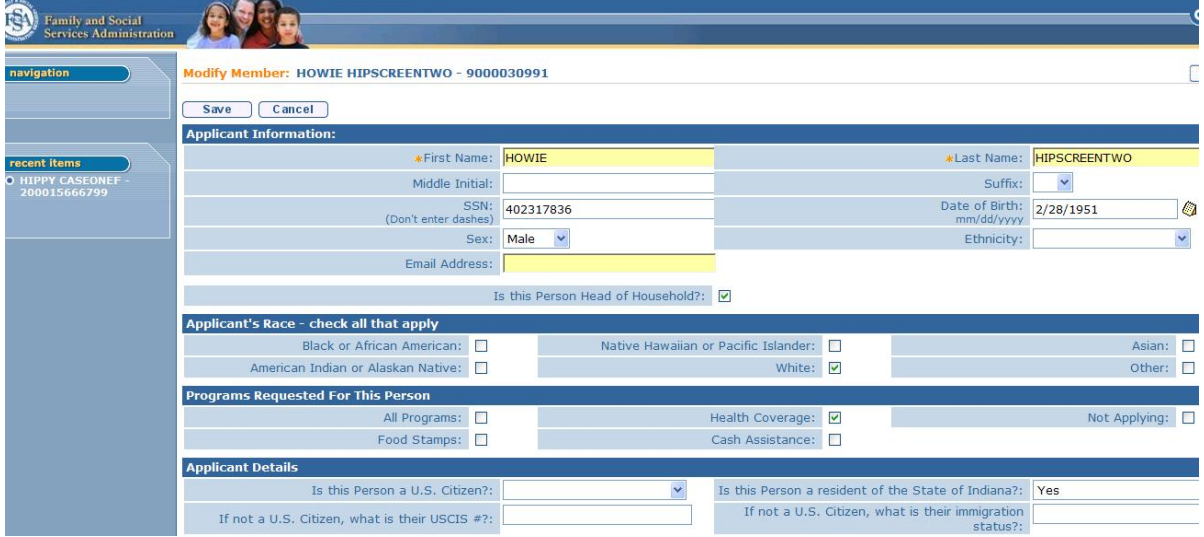| Step	New HIP Application Ready for Initial Review
14.	If more than one household member is listed on the application, click *Reset* to enter the next member's information. • Repeat Steps 9-13 for each household member.
15.	Compare all information on the Application Case Home page with the application, verifying that the information has been data entered correctly.
16.	To complete the AR and AE processes in ICES, the county and township must be entered in the WFMS Application Case. If unknown, the county and/or township may be obtained by using the Township Locator on the OPS Tool home page or by using the Census Bureau website at: http://factfinder.census.gov/servlet/AGSGeoAddressServlet?_lang=en&_programYear=50&_treeId=420. • Click *Edit*. • The WFMS displays the Modify Application Case page. **Note:** Required fields are marked with a red asterisk.
17.	Under the Participant Home Address cluster, using the drop down box, select the county associated with the participant's home address.
18.	Under the Participant Home Address cluster, using the drop down box, select the township associated with the participant's home address.
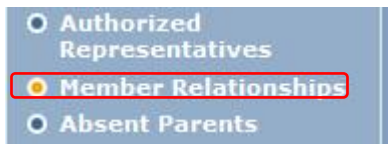
Step	New HIP Application Ready for Initial Review
19.	If additional information needs to be modified, enter corrections in the appropriate data fields. Once necessary modifications have been made, click *Save*. • The WFMS displays the Application Case Home page.
20.	Click *Members* from the left Navigation bar. • The WFMS displays the Members page. • Compare the number of household members listed in the WFMS Application case with the number of household members listed on the application, verifying that the information has been extracted and/or data entered correctly.
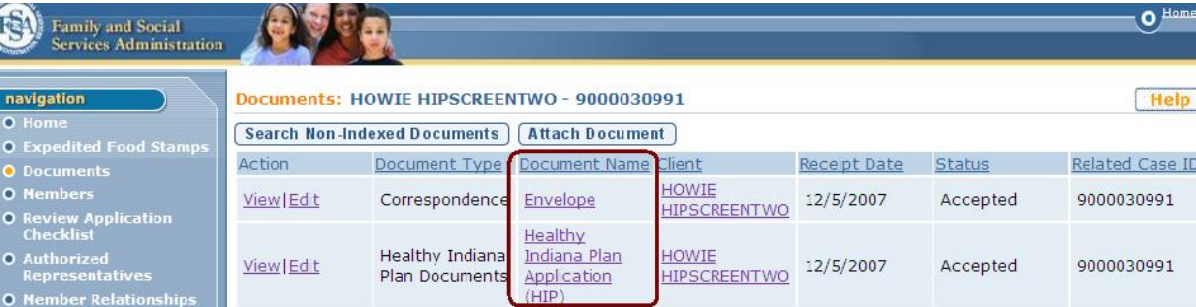
Step	New HIP Application Ready for Initial Review
21.	Click *View* next to the member.

- The WFMS displays the View Member Details page.

Step	New HIP Application Ready for Initial Review
22.	Compare all information on the View Member Details page with the member information on the application; verify that the information has been data entered correctly.

- To Edit Member Details, click *Edit*.

Step	New HIP Application Ready for Initial Review
	• The WFMS displays the Modify Member page where changes are to be made. Once all changes have been made, click *Save*. • The WFMS displays the View Member page. Click *Close*. • The WFMS displays the Members page. • If a member is listed on the application, but not listed in the WFMS application case, refer to Section 8.4.3.2, Processing a HIP Application WI Part I, Add Member <insert hyperlink>.
23.	Click *Authorized Representatives* from the left Navigation bar. • The WFMS displays the Authorized Representatives page.

Step	New HIP Application Ready for Initial Review
24.	Since the HIP Application does not contain a specific field for designation of an authorized representative, the authorized representative information in WFMS will likely be blank. If documentation with the application shows the applicant is designating someone else to apply on her behalf, enter the information in the screen by clicking *New*. If an authorized representative has been entered, click View next to the name to review the information against documents submitted with the application.
25.	If the applicant has designated someone else to apply on their behalf, add that information to WFMS. • To Add an Authorized Representative, refer to Section 8.4.3.3, Processing a HIP Application WI Part I, Add Authorized Representative <insert hyperlink>. • To edit Authorized Representative details, click *Edit* next to the Authorized Representative to be modified. • The WFMS displays the Modify Authorized Representative page where changes are to be made. • Once all changes have been made, click *Save*. • The WFMS displays the Authorized Representatives page.
26.	Click *Member Relationships* from the left Navigation bar. • The WFMS displays the Member Relationships page.
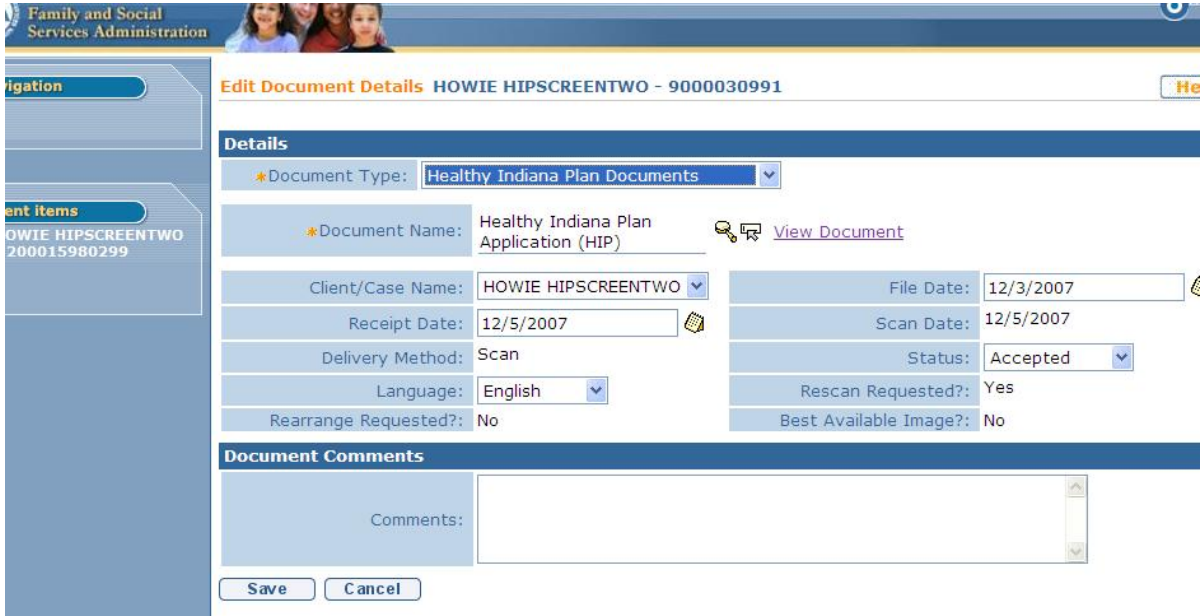
Step	New HIP Application Ready for Initial Review
27.	Compare the Member Relationship information in the WFMS with the member relationship information on the application, verifying that the information has been data entered correctly. • To edit Member Relationship details, click *Edit* next to the Member Relationship to be modified. • The WFMS displays the Modify Member Relationships page where changes are to be made. • Once all changes have been made, click *Save*. • To Add a Member Relationship, refer to Section 8.4.3.4, Processing a HIP Application WI Part I, Add Member Relationship <insert hyperlink>.
28.	Click *Documents* from the left Navigation bar. • The WFMS displays the Documents page.
29.	Click the Document Name hyperlink for the first supporting document received with the application. ✓ The WFMS displays the View Document Details page and an image of the document opens in a separate window.

Step	New HIP Application Ready for Initial Review
	If no supporting documents are included with the application, skip to Step 34.
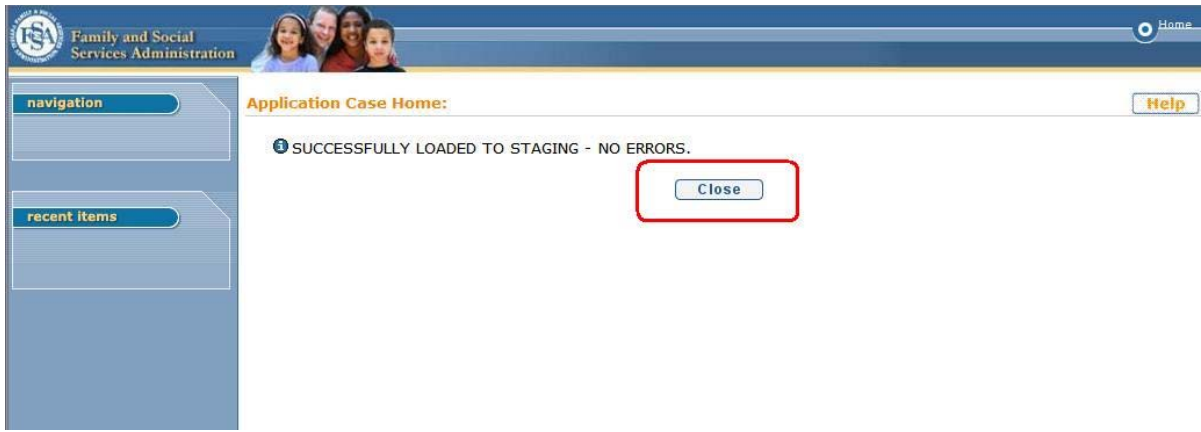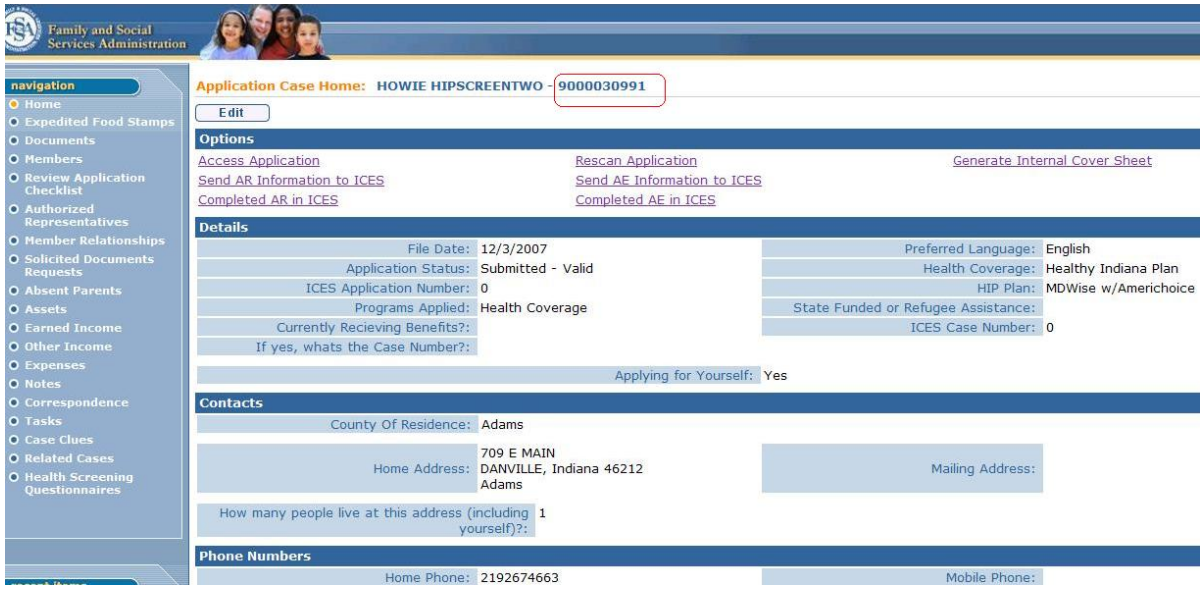
Step	New HIP Application Ready for Initial Review
30.	Review the image of the supporting document to verify the document image is legible and the pages are in the correct order. • If a document image is too light to read, under the Options cluster, click *Rescan*. **Note** if the delivery method of the document is shown as Faxed, the document can not be Rescanned • The WFMS displays the Rescan Confirmation page. Click *Submit*. • If the pages of a multi-page supporting document are not in the correct order and therefore need to be rearranged, refer to Section 8.4.5.3, Processing a HIP Application WI Part II, Initiate Rearrange Document Task <insert hyperlink>.
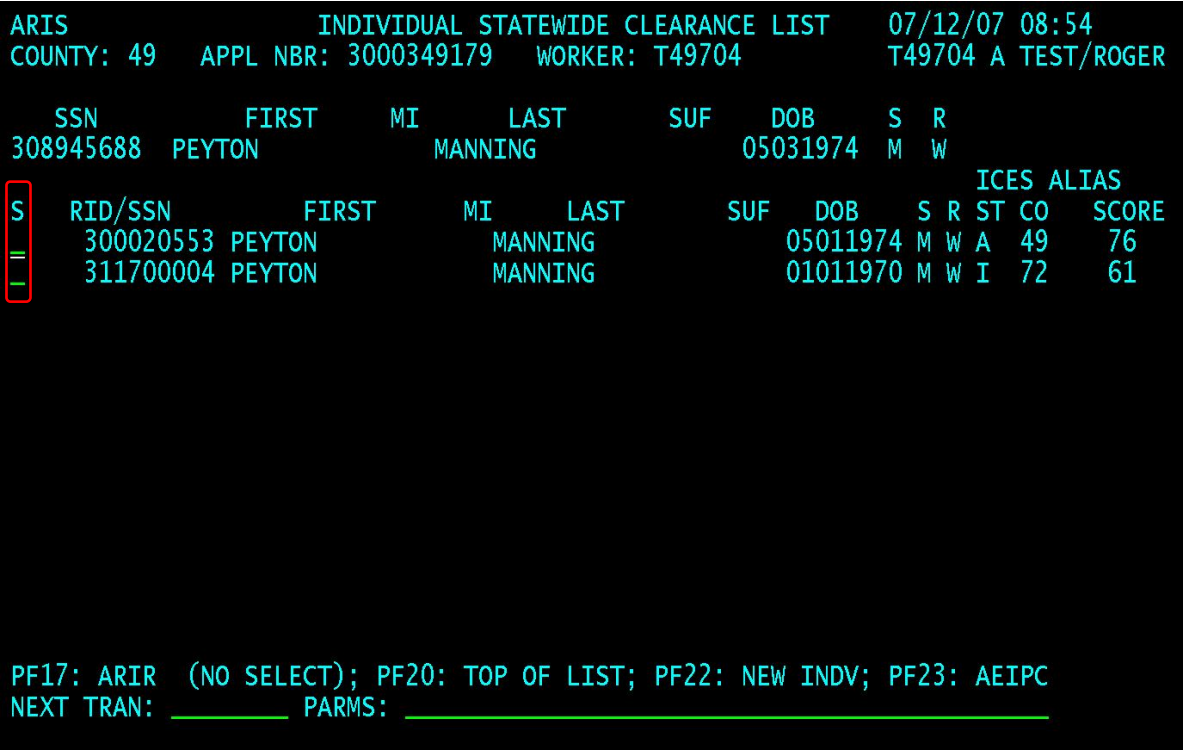
Step	New HIP Application Ready for Initial Review
31.	Review details associated with the document under the Details cluster, verifying the document details are correct. Refer to Section 3.11.2, Document Management \<insert hyperlink\>. • If any of the document details need to be modified, click *Edit*. • The WFMS displays the Edit Document Details page where changes are to be entered. Once necessary document details have been corrected, click *Save*. • The WFMS displays the Documents page.
32.	If a document has been incorrectly indexed to an application, navigate back to the Documents Page. The WFMS displays the Documents page. Click View. On the View Document Details page, click *De-Link*.

Step	New HIP Application Ready for Initial Review
33.	Repeat Steps 29-32 for each supporting document received with the application.
34.	Click *Home* from the left Navigation bar. • The WFMS displays the Application Case Home page.

Step	New HIP Application Ready for Initial Review
35.	From the Application Case Home page, under the Options cluster, click *Send AR Information to ICES*.

- The WFMS displays a confirmation page.

- Click *Close.*
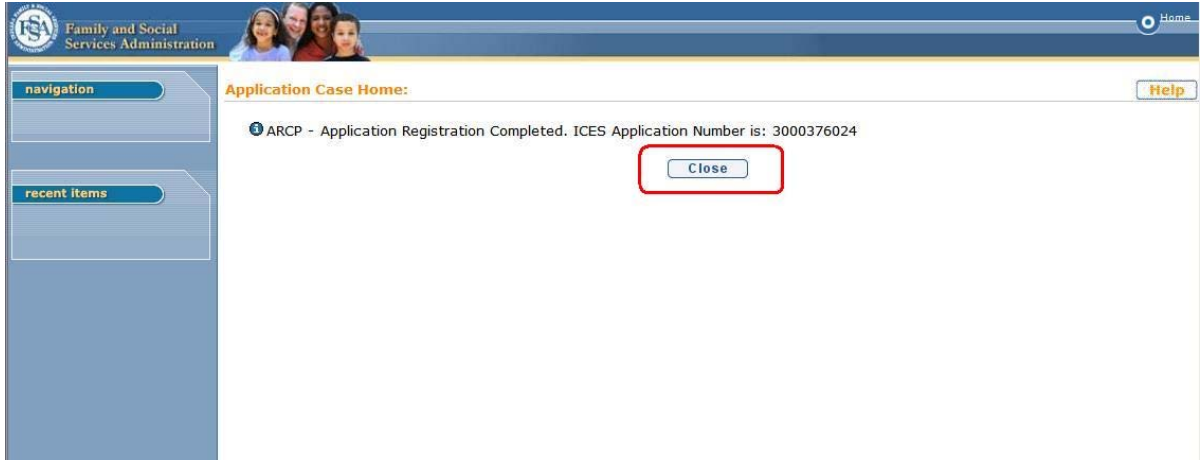
Step	New HIP Application Ready for Initial Review
36.	Navigate to ICES. Enter TRAN: ARLD; PARMS: WFMS Application Number. Press **Enter.** **Note**: The WFMS Application Number can be found at the top of the Application Case Home page.
37.	The WFMS pushes the application information through the AR driver flow in ICES.
38.	Complete subsequent application registration screens in ICES. • If the WFMS pushes all Application Registration information with the AR Driver Flow stopping at ARAS, skip to Step 42.
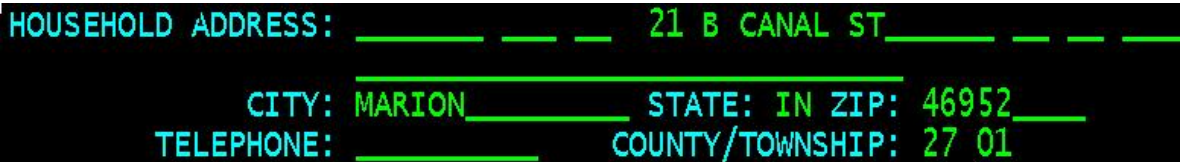
Step	New HIP Application Ready for Initial Review
39.	Complete screen ARIS – Individual Statewide Clearance List. ARIS displays when potential matches are found.

```
ARIS                    INDIVIDUAL STATEWIDE CLEARANCE LIST    07/12/07 08:54
COUNTY: 49   APPL NBR: 3000349179   WORKER: T49704              T49704 A TEST/ROGER

   SSN          FIRST     MI     LAST       SUF    DOB      S   R
308945688   PEYTON              MANNING             05031974  M   W
                                                                    ICES ALIAS
S   RID/SSN        FIRST      MI     LAST     SUF    DOB     S R ST CO    SCORE
_   300020553 PEYTON              MANNING             05011974 M W A  49      76
_   311700004 PEYTON              MANNING             01011970 M W I  72      61




















PF17: ARIR  (NO SELECT); PF20: TOP OF LIST; PF22: NEW INDV; PF23: AEIPC
NEXT TRAN: _____  PARMS: _____
```

- For an exact match, place an "X" in the select column and press **Enter**.

- The next individual displays and the same process is repeated until all individuals have been cleared.

- If demographic data contained in ICES is different than demographic data contained on the application, reconcile the information to allow completion of the application registration process without creating a duplicate RID.

- Be sure to include any incorrect demographic data in case notes to inform the next worker of the necessity to make any required demographic corrections.

- If the individual is not known to ICES, press **PF22**.

- An edit appears at the bottom of the screen.

- To confirm the individual is new, enter "Y" and press **Enter**.

```
PF22 - NEW INDV, ARE YOU SURE ?, PLEASE CONFIRM:    _   (Y/N)
```
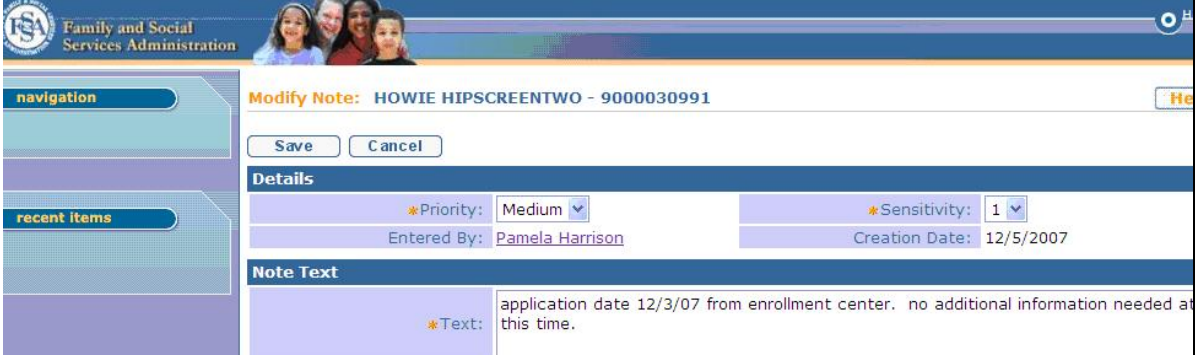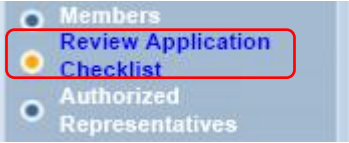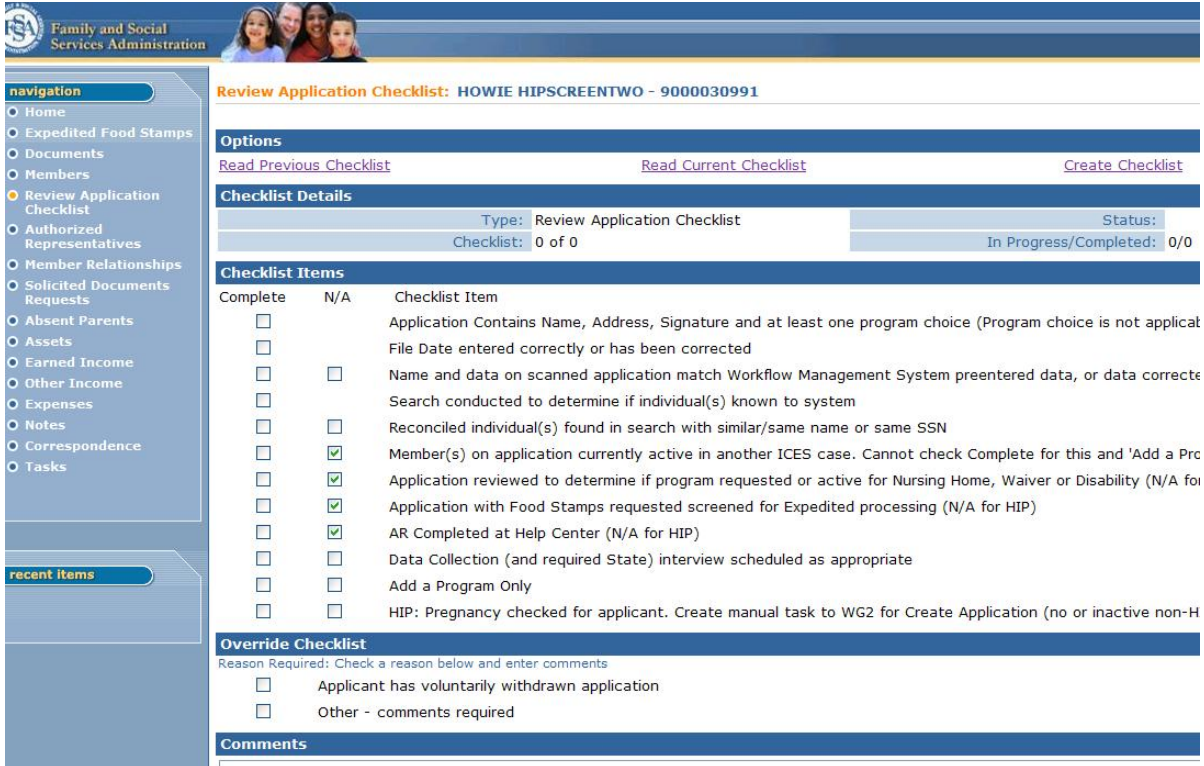
Step	New HIP Application Ready for Initial Review
40.	Complete screen ARCR – Statewide Clearance Results. ARCR displays the results of the individual clearance process for all applicants. **DO NOT SELECT A PREVIOUS CASE ON ARCR.** Press **Enter**. ``` ARCR STATEWIDE CLEARANCE RESULTS 12/05/07 16:44 COUNTY: 27 APPL NBR: 2000087029 WORKER: T49708 P REFM/HAR CASE NBR: SCREENER: T49708 CURR/LAST CLEAR R SEL FIRST MI LAST SUF SSN KNOWN CASE ST FH STAT HOWIE HIPSCREENTWO 402317836 0 N NEW ``` • If an individual fails clearance, refer to File Clearance Failure Reason Codes by entering TRAN: RFDI; PARMS: TSCF. Resolve clearance issues and continue. ``` ARCR STATEWIDE CLEARANCE RESULTS 12/17/07 09:59 COUNTY: 27 APPL NBR: 2000087029 WORKER: T49709 A REFM/BIPPE CASE NBR: 2000087029 SCREENER: T49708 CURR/LAST CLEAR RSN SEL FIRST MI LAST SUF SSN KNOWN CASE ST FH STAT CDE HOWIE HIPSCREENTWO 402317836 2000087029 A N NEW ```
41.	View screen ARPC – Prior Contacts List. ARPC is an informational screen. Press **Enter**. ``` ARPC PRIOR CONTACTS LIST 12/17/07 10:01 COUNTY: 27 APPL NBR: 2000087029 T49709 A REFM/BIPPE INDIV NUM FIRST MI LAST SUF SSN DOB S R 200015980299 HOWIE HIPSCREENTWO 402317836 02281951 M W PROGRAMS IDENTIFIER STATUS BEGIN END COUNTY APPLCN REGISTRATION 2000087029 CASE 12/03/07 27 ```
42.	Complete screen ARCP – Choice of Programs. ARCP is pre-filled with choice of programs for each member. • Press **Enter**. • An edit should be displayed that states "AR Completed." **Note**: For a HIP Application under Medical should be an "H", but there should be no other programs selected along with Medical if it is a HIP Application. ``` ARCP CHOICE OF PROGRAMS 12/17/07 10:00 COUNTY: 27 APPL : 2000087029 WORKER: T49709 A REFM/BI LAST ACTIVITY DATE: 12/03/07 STATUS: CASE ALL LISTED INDIVIDUALS APPLY FOR CASH, MEDICAL, FS: _ INDIVIDUAL CASH,MEDICAL,FS CASH MEDICAL FS MA ENROLL 1 HOWIE H _ N H N N ```
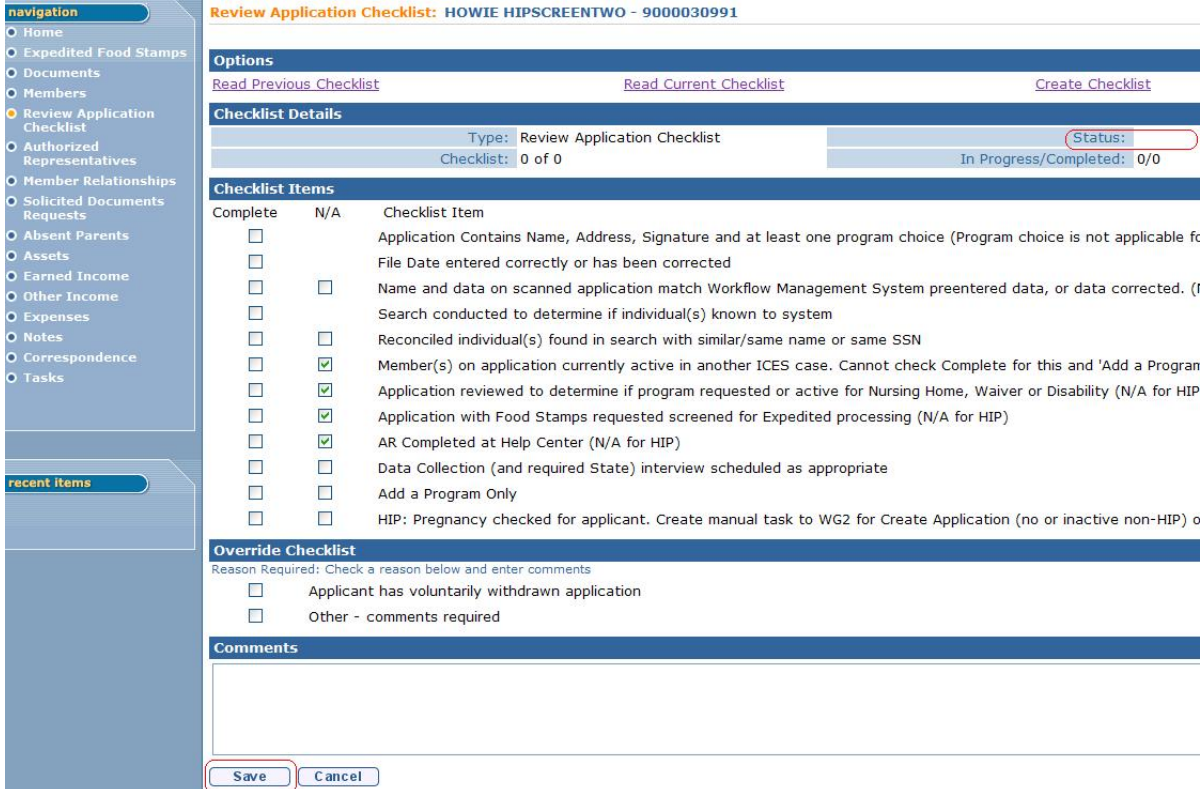
Step	New HIP Application Ready for Initial Review
43.	Return to WFMS. Under the Options cluster, click *Completed AR* in ICES. • The WFMS displays a confirmation page. Click *Close*.

Step	New HIP Application Ready for Initial Review
44.	Go back to ICES and enter ARAD on Next Tran:, Parms: should have your case number displayed. Click Enter. Review the address. Correct if necessary as shown below so that the number is under the Number heading, the Street name is under the Street heading, etc.
45.	Click *Notes* from the left Navigation bar. • The WFMS displays the Notes page.
46.	Click *New*. • The WFMS displays the Create Note page.

Step	New HIP Application Ready for Initial Review
47.	Enter case notes regarding the application review and registration process. • Include application date; file clearance issues, demographic information that needs to be reconciled during AE, and any actions taken or information pertinent to the continued processing of the application. • Once all notes have been entered, click *Save*. • The WFMS displays the Notes page with the newly added note.
48.	Click *Review Application Checklist* from the left Navigation bar. • The WFMS displays the Review Application Checklist page.

Step	New HIP Application Ready for Initial Review
49.	Mark the appropriate boxes on the Review Application Checklist. Items which are not applicable to HIP may be prefilled. • If the applicant has voluntarily withdrawn the application or if there is another reason to override the checklist, mark the appropriate box and enter comments (if necessary). • Marking this box forwards the appropriate task to the appropriate Workgroup.
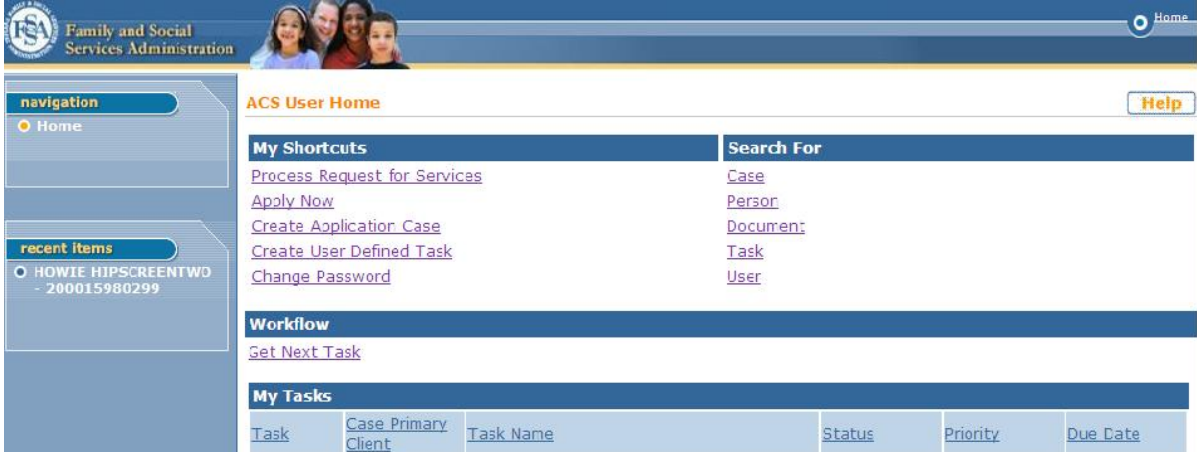
Step	New HIP Application Ready for Initial Review
50.	Once all applicable items have been certified on the checklist, click *Save*.

	• The WFMS will update the status of the checklist to Completed and create the appropriate task for the appropriate Workgroup.
51.	Click *Tasks* from the left Navigation bar.

• The WFMS displays the Tasks page with the task generated as a result of the completion of the Review Application Checklist.
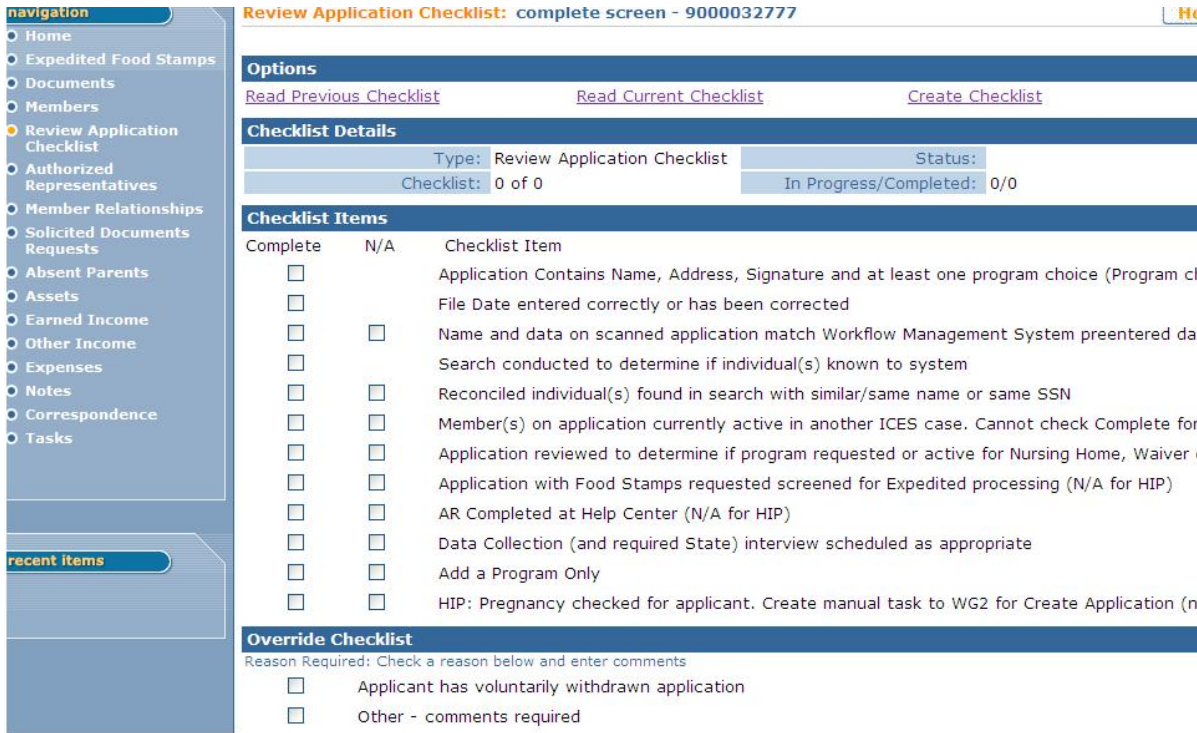
Step	New HIP Application Ready for Initial Review
52.	Click the *Task ID* for the New Application Ready for Initial Review. • The WFMS displays the Task Home.
53.	Under the Options cluster, click *Close Task*. • The WFMS displays the Task Home with the next task.
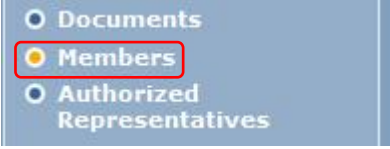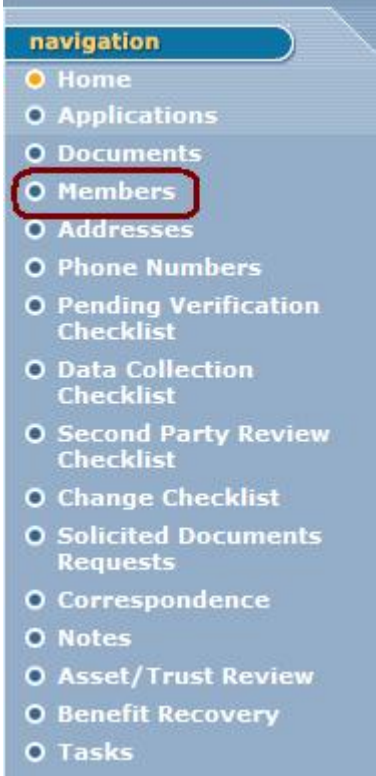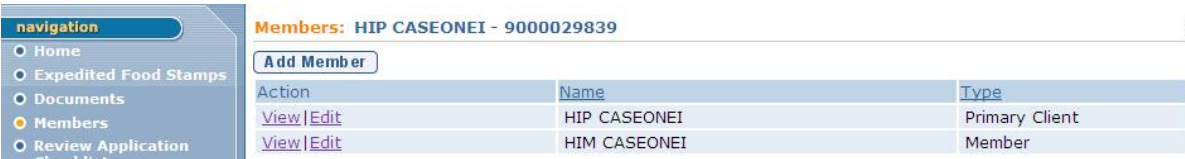
8.4.3.2   Add Member

Step	Add Member
1.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
2.	Using Search work instructions, search by address, household member name(s), and household member SSN(s). Refer to Section 3.11.3, Search Instructions <insert hyperlink>.
3.	Click *Person* under the Search For cluster. • The WFMS displays the Search Person page.
4.	Enter the Search Criteria for the member to be added.

Step	Add Member
5.	Click *Search*. • The WFMS populates the Search Results cluster based on the search criteria entered.

Step	Add Member
6.	• Review the search results to determine if any of the individuals on the application are in another case with either a pending or open status. • If any of the individuals on the application are in another case, determine whether the application is either an Add a Program or Add a Person application. ✓ Add a Program for HIP cases occurs when a member of a household with an active HIP case is not active for HIP and then applies for HIP. Add a Person occurs when an individual without an active HIP case moves into a HIP household and submits an application for HIP. If you identify either of these situations, enter a note in WFMS for review by WG2. **Note**: If the individual is in another active or closed case that is not a HIP case, a new ICES case must be created for the HIP application. ICES will not allow entry of the HIP program indicator (H) when the case contains non-HIP assistance groups or non-HIP programs are selected on these screens. ***HIP applications cannot be combined with or added to ICES cases containing any non-HIP programs.*** • Click *Review Application Checklist* from the left Navigation bar and mark the appropriate box.
7.	Repeat Steps 2-6 for each additional household member to be added.

Step	Add Member
8.	Click *Members* from the left Navigation bar. • The WFMS displays the Member page.
9.	From the Members page, click *Add Member*. • The WFMS displays the Add Member page.

Step	Add Member
10.	Using information contained on the application, enter all information for the member to be added.

- Once all information is complete, click *Add*.

- The WFMS displays the Members page.

- To Cancel the Added Member, click *Cancel*.

The WFMS displays the Members page.

Step	Add Member
11.	Continue with Step 22 of <mark>Section 8.4.3.1, Processing a HIP Application Part I, New Application Ready for Initial Review</mark> <insert hyperlink>

8.4.3.3   Add Authorized Representative

Although the HIP application does not contain a field for an applicant to designate an authorized representative, if information provided with the application indicates such a designation, the steps below are used to add an authorized representative to the case.

Step	Add Authorized Representative
1.	From the Authorized Representative page, click *New*.
2.	Using information provided with the application, enter all information for the Authorized Representative.

Step	Add Authorized Representative
3.	Click *Save*. • The WFMS displays the Authorized Representative page. • Click *Save & New* to add more than one authorized representative.
4.	Repeat Steps 1-3 for each additional Authorized Representative to be added.
5.	Continue with Step 25 of Section 8.4.3.1, Processing a HIP Application WI Part I, New Application Ready for Initial Review <insert hyperlink>

8.4.3.4   Add Member Relationship
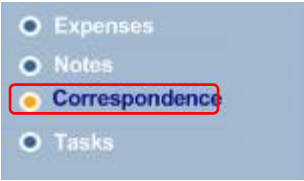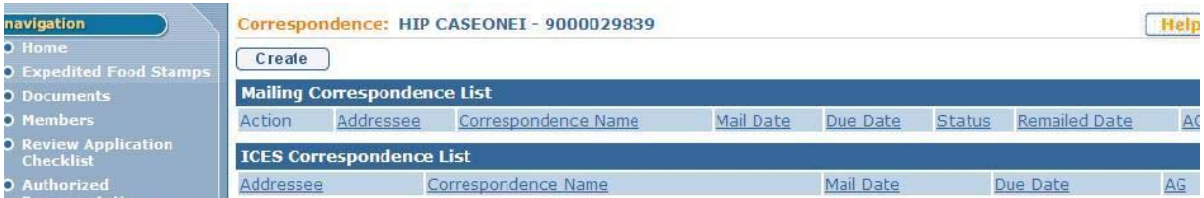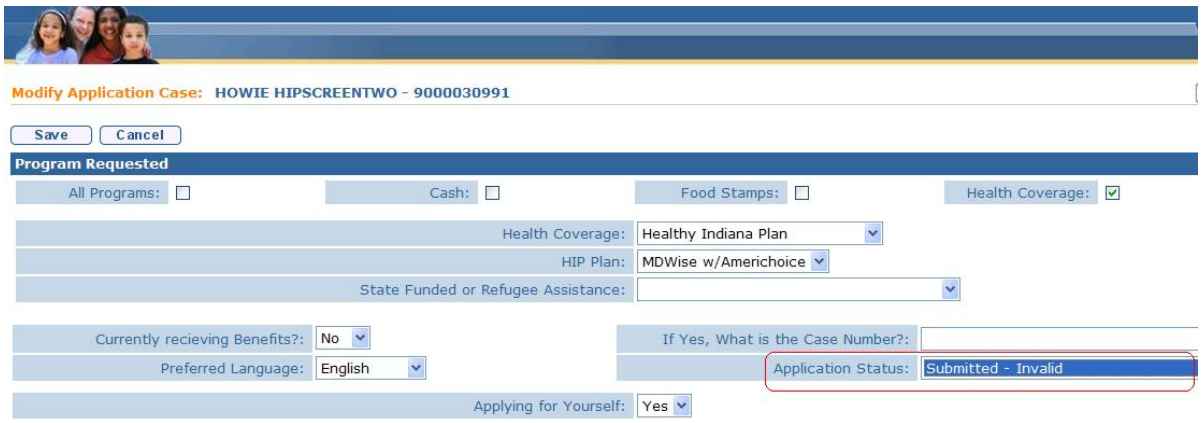
Step	Add Member Relationship

Step	Add Member Relationship
1.	From the Member Relationship page, click *New*. • The WFMS displays the Create Member Relationship page.
2.	Using information contained on the application, enter all information for the new member relationship.

Step	Add Member Relationship
3.	Click *Save*. • The WFMS displays the Member Relationship page. • Click *Save & New* to add more than one member relationship.
4.	Repeat Steps 1-3 for each additional member relationship to be added.
5.	Continue with Step 27 of Section 8.4.3.1, Processing a HIP Application WI Part I, New Application Ready for Initial Review <insert hyperlink>

8.4.3.5   For Future Use

8.4.3.6   Invalid Application Contains Name and Address, but No Signature

Step	Invalid Application Contains Name and Address, but No Signature
1.	From the Application Home page, click *Correspondence* from the left Navigation bar. ○ Expenses ○ Notes ● Correspondence ○ Tasks The WFMS displays the Correspondence List page. navigation ○ Home ○ Expedited Food Stamps ○ Documents ○ Members ○ Review Application Checklist ○ Authorized Correspondence: HIP CASEONE1 - 9000029839 Help Create **Mailing Correspondence List** Action Addressee Correspondence Name Mail Date Due Date Status Remailed Date AC **ICES Correspondence List** Addressee Correspondence Name Mail Date Due Date AG
2.	Refer to Section 3.11.4.3, Sending Notices, Create Correspondence in the WFMS <insert hyperlink> to send the applicant an unsigned application notice and a copy of the invalid application.
3.	From the Application Home page, click *Edit*. The WFMS displays the Modify Application Case page.
4.	Under the Program Requested cluster, use the drop down for the Application Status to change the Application Status to Submitted – Invalid. Modify Application Case: HOWIE HIPSCREENTWO - 9000030991 Save Cancel **Program Requested** All Programs: ☐ Cash: ☐ Food Stamps: ☐ Health Coverage: ☑ Health Coverage: Healthy Indiana Plan HIP Plan: MDWise w/Americhoice State Funded or Refugee Assistance: Currently recieving Benefits?: No If Yes, What is the Case Number?: Preferred Language: English Application Status: Submitted - Invalid Applying for Yourself: Yes
5.	Click Save. • The WFMS displays the Application Case Home page.
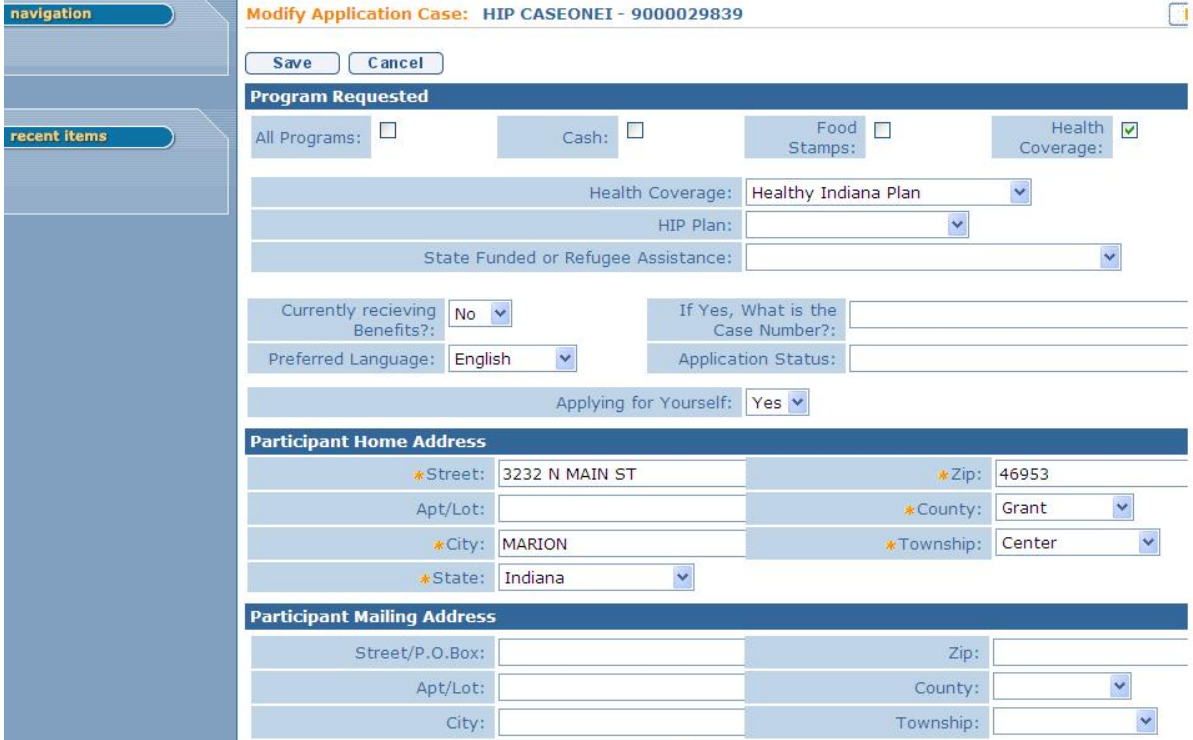
Step	Invalid Application Contains Name and Address, but No Signature
6.	Click *Notes* from the left Navigation bar. ○ Expenses ○ Notes ○ Communications • The WFMS displays the Notes page. HOWIE HIPSCREENTWO - 9000030991 Notes: HOWIE HIPSCREENTWO - 9000030991 New Action Entered By Creation Date Text
7.	Click *New*. • The WFMS displays the Create Note page. Create Note: HOWIE HIPSCREENTWO - 9000030991 Details *Priority: Medium *Sensitivity: 1 Note Text *Text: Save Save & New Cancel

Step	Invalid Application Contains Name and Address, but No Signature
8.	Enter notes indicating that an invalid application has been returned for the applicant's signature. • Once notes have been entered, click *Save*. • The WFMS displays the Application Case Home page.
9.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
10.	Click the *Task ID* for the New Application ready for Initial Review Task with an Open Status. The WFMS displays the Task Home.
11.	Under the Options cluster, click *Close Task*.

8.4.3.7 Invalid Application Contains Name and Signature, but No Address
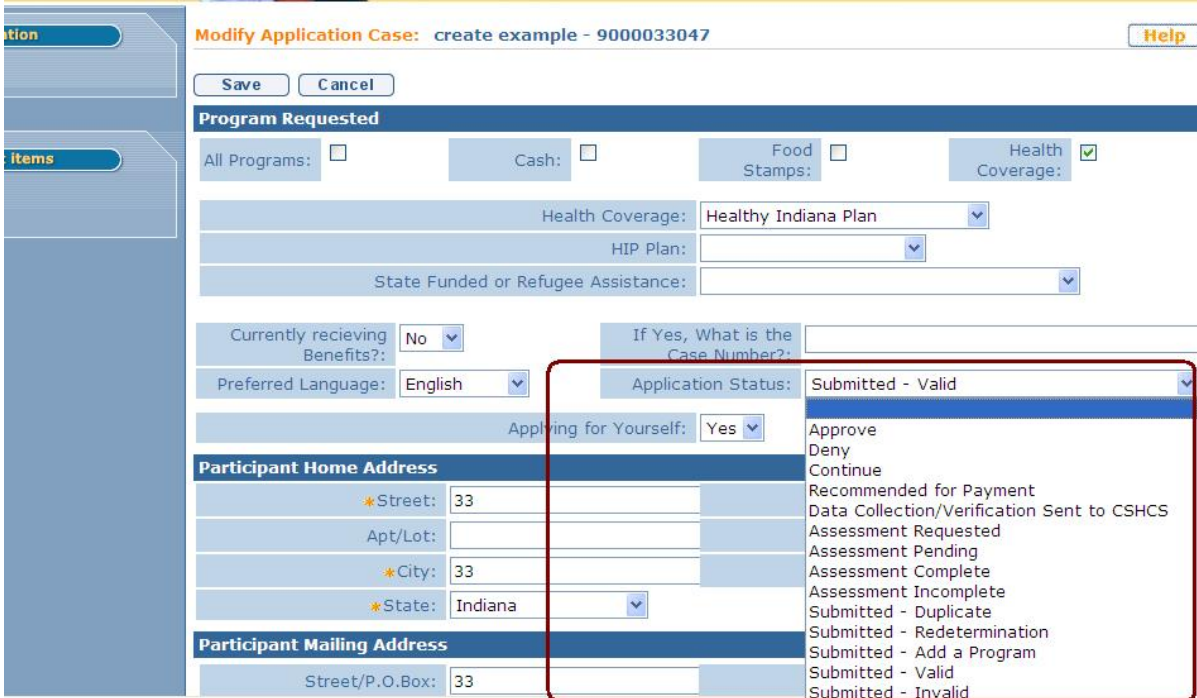
Step	Invalid Application Contains Name and Signature, but No Address
1.	From the Application Case Home page, under the Phone Numbers cluster, attempt telephone contact (following business rules) for any/all telephone numbers listed. Refer to Section 4.9, Protocol for Outbound Calls <insert hyperlink> If no phone number is provided or both attempts to contact the applicant are not successful, skip to Step 4.
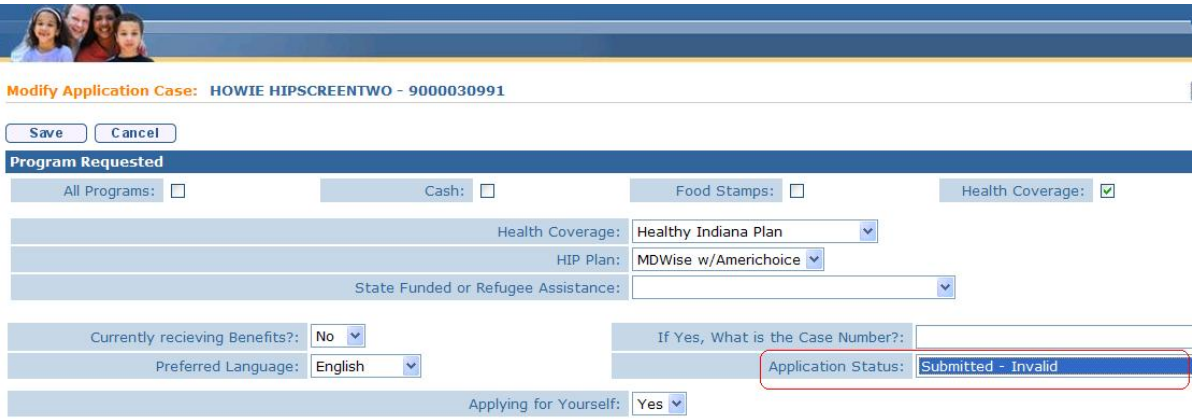
Step	Invalid Application Contains Name and Signature, but No Address
2.	If telephone contact is made with the applicant, identify yourself as calling on behalf of the FSSA and confirm you are speaking with the applicant before continuing with the purpose of the call. • Inform the applicant that his/her application has been received but no address has been submitted. • Obtain the applicant's home address (and mailing address if different from home address) via telephone. • Update the address(es) in the WFMS by clicking *Edit* from the Application Home page. • The WFMS displays the Modify Application Case page.
3.	Under the Participant Home Address cluster, enter the home address provided by the applicant via telephone. • If the applicant indicated he/she has a mailing address, enter the mailing address under the Participant Mailing Address cluster. • Once all information has been entered, click *Save*. • The WFMS displays the Application Case Home page.
4.	Click *Notes* from the left Navigation bar.

Step	Invalid Application Contains Name and Signature, but No Address
	 - The WFMS displays the Notes page.
5.	Click *New*. - The WFMS displays the Create Note page.
6.	Enter notes regarding the status of the invalid application. **a**. If the applicant's address has been obtained via telephone, enter notes indicating that an invalid application with no address has been received, telephone contact has been made with the applicant and the address has been modified in the WFMS. Click *Save* and go to Step 7. **b.** If unable to contact applicant via telephone, enter notes indicating that an invalid application with no address has been received, and telephone contact has been unsuccessful (document each attempted phone contact and phone number(s) called).

Step	Invalid Application Contains Name and Signature, but No Address
	Create Note: sally jones - 5000258848 [Help] **Details** *Priority: Medium ▾ *Sensitivity: 1 ▾ **Note Text** *Text: Invalid application (due to no address) received for Sally Jones. Attempted to contact Sally Jones at 317-788-0921 to obtain address information. No answer. [Save] [Save & New] [Cancel] • Click Save. The WFMS displays the Application Case Home page. • Skip to Step 11.
7.	Click *Edit*. • The WFMS displays the Modify Application Case page. **Modify Application Case: HIP CASEONEI - 9000029839** [Save] [Cancel] **Program Requested** All Programs: ☐ Cash: ☐ Food Stamps: ☐ Health Coverage: ☑ Health Coverage: Healthy Indiana Plan ▾ HIP Plan: ▾ State Funded or Refugee Assistance: ▾ Currently recieving Benefits?: No ▾ If Yes, What is the Case Number?: Preferred Language: English ▾ Application Status: Applying for Yourself: Yes ▾ **Participant Home Address** *Street: 3232 N MAIN ST *Zip: 46953 Apt/Lot: *County: Grant ▾ *City: MARION *Township: Center ▾ *State: Indiana ▾ **Participant Mailing Address** Street/P.O.Box: Zip: Apt/Lot: County: ▾ City: Township: ▾

Step	Invalid Application Contains Name and Signature, but No Address
8.	Change the Application Status from Invalid to Valid by using the drop-down box.
9.	Click Save. • The WFMS displays the Application Home page.
10.	If the address has been obtained, continue processing the new application at Step 7 of Section 8.4.3.1, Processing a HIP Application WI Part I, New HIP Application Ready for Initial Review <insert hyperlink>.
11.	If the address cannot be obtained, from the Application Home page, click *Edit*. The WFMS displays the Modify Application Case page.

Step	Invalid Application Contains Name and Signature, but No Address
12.	Under the Program Requested cluster, use the drop down for the Application Status to set the Application Status to Submitted – Invalid.
13.	Click *Save*. The WFMS displays the Application Case Home page.
14.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.

Step	Invalid Application Contains Name and Signature, but No Address
15.	Click the *Task ID* for the New Application ready for Initial Review Task with an Open Status. • The WFMS displays the Task Home.
16.	Under the Options cluster, click *Close Task*.

8.4.3.8   Pregnancy

Step	HIP Application for Pregnant Applicant
.1	If the applicant is pregnant (noted in section 10 of the HIP application where applicant places a check mark if pregnant), perform a search to see if the applicant already has a pregnancy application or open case for health coverage. Refer to Search work instructions 3.11.3 <insert hyperlink>. • If the applicant is found on a pregnancy application or open case for health coverage, continue processing the HIP application. • If the applicant is not found on another pregnancy Health Coverage application or case, the program choice needs to switch from HIP to Pregnancy
2	Determine if the applicant lives in one of the 12 counties in the Modernized Solution. The counties are shown in the Office Locator in the OPS tool: **Counties shown below ARE part of the pilot project** Click here to view the Grant Distict Offices • If the applicant lives in a Modernized Solution county, go to Step 3 and continue processing the case. NOTE: After the AR push is complete and the Review Application Checklist is complete, a task is created for the Service Center Staff to work as a regular pregnancy Health Coverage application. Be sure to document in WFMS notes all action taken on case and that it was submitted for HIP but determined to be a Pregnancy application • If the applicant does not live in a Modernized Solution county, the application will need to be transferred to that specific county. Refer to the Case Transfer Procedures in OPS <insert hyperlink>.
3	If the applicant is listed on the HIP application but is NOT applying for HIP and a spouse is shown as applying for HIP, continue to process the HIP application for the spouse.
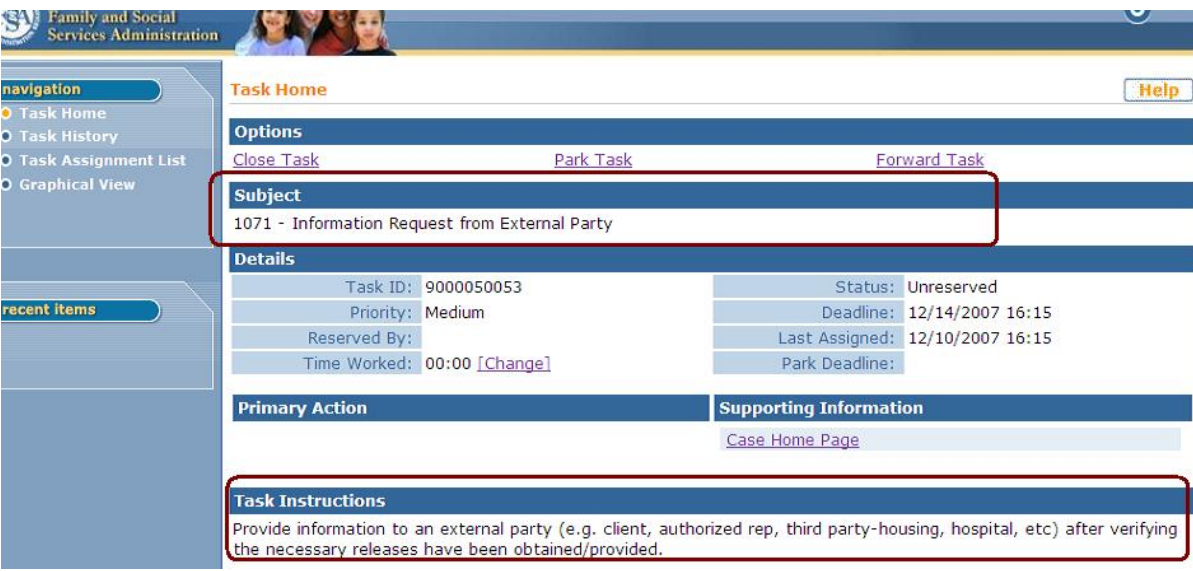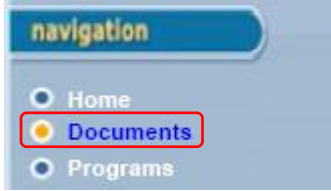
Step	HIP Application for Pregnant Applicant
4	If both the husband and wife apply and the wife is pregnant, search for a pregnancy application or case for health coverage. Refer to Search work instructions 3.11.3 <insert hyperlink.> • If the wife has a pregnancy application or case for health coverage, continue processing the HIP application for both applicants. (The wife's HIP application will eventually be denied, if a pregnancy application is in process.) • If the wife does not have a pregnancy application or case for health coverage, determine if she lives in a Modernized Solution county. ✓ If the wife does not live in a Modernized Solution county, continue processing the HIP application for the husband and when finished, go to Step 7 and transfer the application for pregnancy health coverage to that specific county. <insert hyperlink to Case Transfer Procedures in OPS> ✓ If the wife lives in a Modernized Solution county, continue processing the HIP application for the spouse, complete the Review Application checklist and continue to Step 5. NOTE: In a situation where you are reviewing a HIP application for the spouse and a Pregnancy application for the wife, a Review Application Checklist must be completed for HIP for the husband and a separate Review Application Checklist must be completed for the wife's application case for pregnancy health coverage that you create in the next step.[.
5	If the wife lives in a Modernized Solution county, create a new application case for pregnancy health coverage. <insert hyperlink to 8.4.3.11 Create Application Case beginning with Step 7> **ACS User Home** 	**My Shortcuts**	**Search For**	 |---|---| 	Process Request for Services	Case	 	Apply Now	Person	 	Create Application Case	Document	 	Create User Defined Task	Task	 	Change Password	User	 Copy all documents from the HIP case into the new case for the wife. (Note: until the system supports this, open and then save each of the documents to the hard drive of your computer and attach each document to the new case).
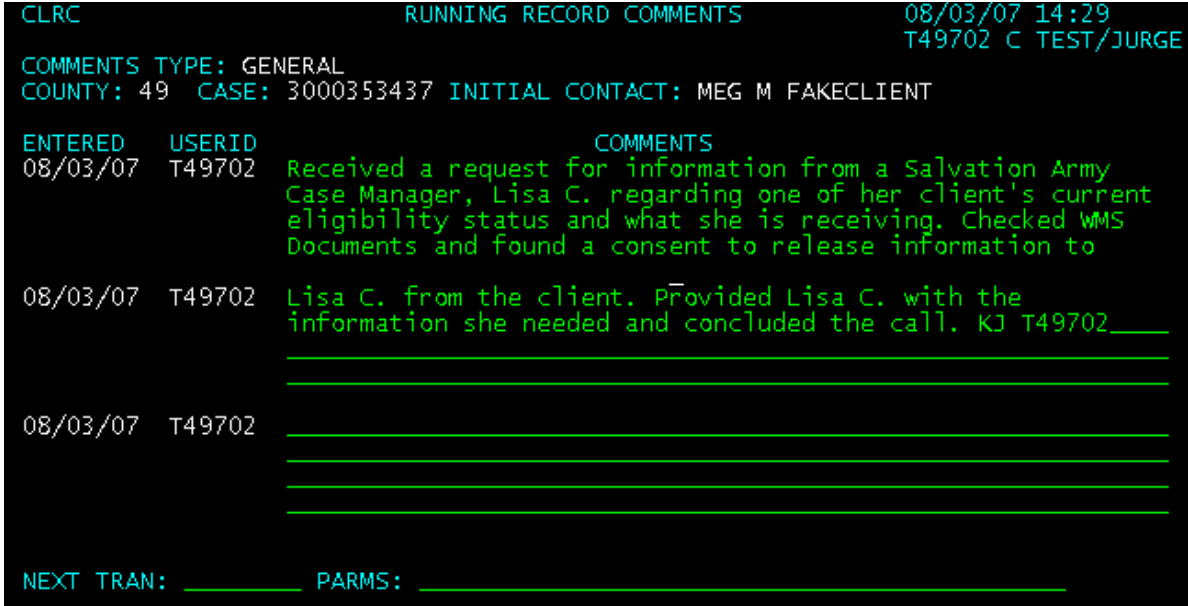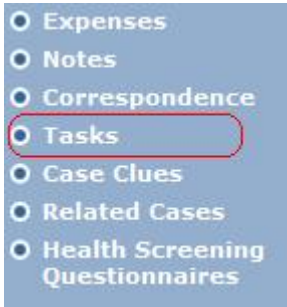
Step	HIP Application for Pregnant Applicant
6	Creating the new application case for pregnancy health coverage includes sending AR information to ICES for the pregnancy application, using same application date as noted on HIP application and completing Review Application Checklist. **Be sure to check N/A next to HIP: Pregnancy Checked for Applicant so that a task is created for the Service Center to work the pregnancy application for health coverage.** Type: Review Application Checklist — Status: Completed Checklist: 1 of 1 — In Progress/Completed: 0/1 (1) **Checklist Items** Complete / N/A / Checklist Item ☑ — Application Contains Name, Address, Signature and at least one program choice ☑ — File Date entered correctly or has been corrected ☑ ☐ Name and data on scanned application match Workflow Management System p... ☑ — Search conducted to determine if individual(s) known to system ☑ ☐ Reconciled individual(s) found in search with similar/same name or same SSN ☐ ☑ Member(s) on application currently active in another ICES case. Cannot check ☐ ☑ Application reviewed to determine if program requested or active for Nursing Hc... ☐ ☑ Application with Food Stamps requested screened for Expedited processing (N/... ☐ ☑ AR Completed at Help Center (N/A for HIP) ☐ ☑ Data Collection (and required State) interview scheduled as appropriate ☐ ☑ Add a Program Only ☐ ☑ HIP: Pregnancy checked for applicant. Create manual task to WG2 for Create A... NOTE: After the AR push and Review Application Checklist are complete, a task is created for the Service Center to continue working the pregnancy application for health coverage. Be sure to enter notes in WFMS regarding all action taken on the case, including that it was submitted for HIP and determined to be a pregnancy application for health coverage.
7	If the applicant does not live in a Modernized Solution county, transfer the application for pregnancy health coverage to that specific county. Refer to Case Transfer Procedures in OPS <insert hyperlink>. If the applicant lives in a Modernized Solution county, close this task and get the next task for processing.

8.4.3.9   Information Request from External Party
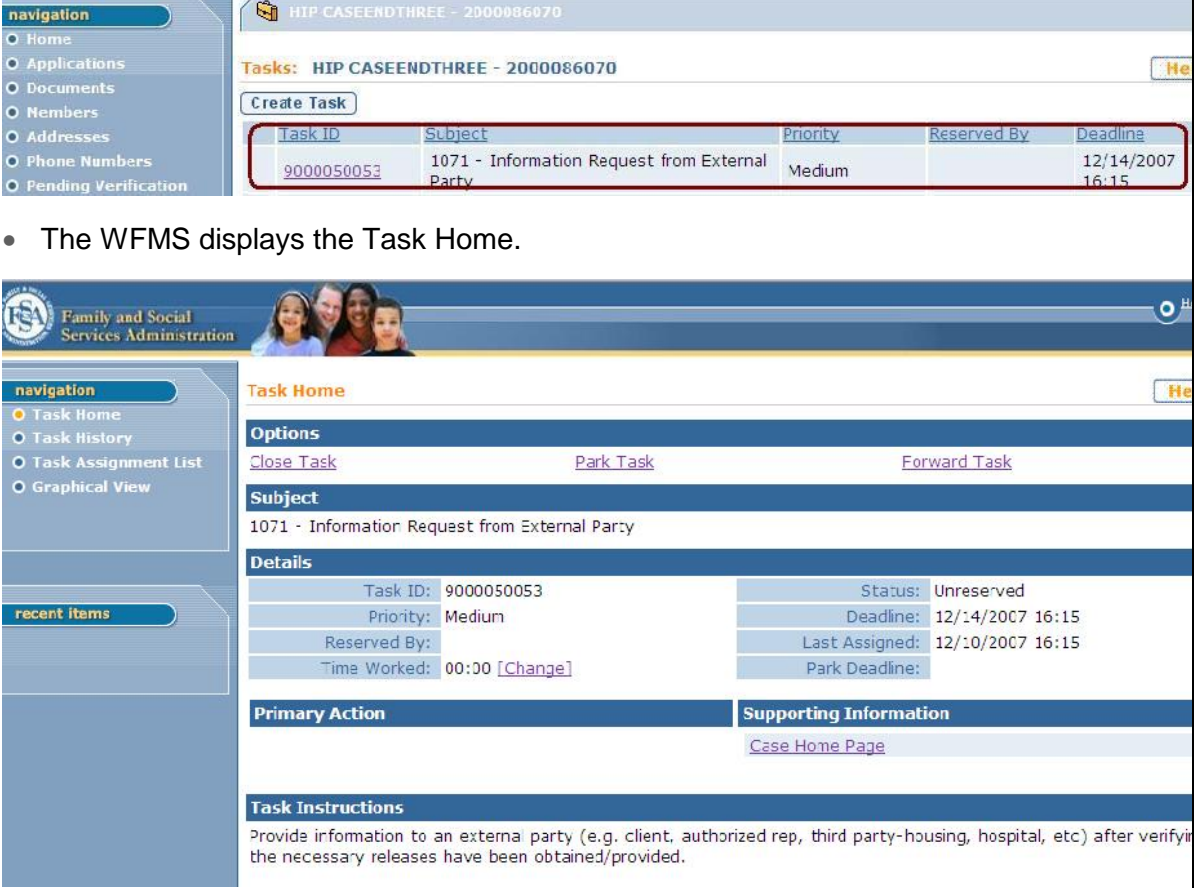
Step	Information Request from External Party

Step	Information Request from External Party
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID*. The WFMS displays the Task Home.
2.	View the Task Name and Task Instructions.
3.	Under the Supporting Information cluster, click *Case Home page*. • The WFMS displays the Application Case Home page or Case Home page.

Step	Information Request from External Party
4.	Click *Documents* from the left Navigation bar. navigation O Home O Documents O Programs • The WFMS displays the Documents page.
5.	From the documents indexed to the application or case, identify the release necessary to provide information to the external party. • Some information requests from external parties may be accompanied by a signed release. If a request is accompanied by a valid signed release, go to Step 6. • If there is no valid signed release on file for the external party, see Section 8.4.3.10, Processing a HIP Application WI Part I, No Signed Release of Information on File <insert hyperlink>.
6.	Provide the information to the external party via the preferred method (i.e. telephone, mail, or fax). • If the external party cannot be reached via telephone and a mailing address has been provided for the external party, return the information request via mail. Refer to Section 3.11.4, Sending Notices <insert hyperlink>. • If the external party cannot be reached via telephone and no mailing address has been provided, refer to Section 3.11.1, Creating, Parking, Forwarding, Getting, and Opening Tasks <insert hyperlink> for instructions to park the task and attempt contact following business rules.
7.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES Case Number. NEXT TRAN: CLRC____ PARMS: 3000076384____ **Note**: If an ICES case does not exist, update notes in the WFMS. • Click *Notes* from the left Navigation bar. O Expenses O Notes O Communications • The WFMS displays the Notes page. • Click *New*. • The WFMS displays the Create Note page.

Step	Information Request from External Party
8.	Enter case notes regarding the information request from external party.
	• Include the name of the third party requestor, information requested, the date information was provided, method of providing information (if information provided via phone), name and phone number of external party contact.
|    | ```
CLRC                    RUNNING RECORD COMMENTS              08/03/07 14:29
                                                             T49702 C TEST/JURGE
COMMENTS TYPE: GENERAL
COUNTY: 49  CASE: 3000353437 INITIAL CONTACT: MEG M FAKECLIENT

ENTERED    USERID                    COMMENTS
08/03/07   T49702   Received a request for information from a Salvation Army
                    Case Manager, Lisa C. regarding one of her client's current
                    eligibility status and what she is receiving. Checked WMS
                    Documents and found a consent to release information to

08/03/07   T49702   Lisa C. from the client. Provided Lisa C. with the
                    information she needed and concluded the call. KJ T49702____

08/03/07   T49702   _____



NEXT TRAN: _____    PARMS: _____
``` |
9.	If the information request from an external party results in a potential or known change that impacts eligibility and must be acted upon, even if the client does not report the change, such as changes not related to recalculation of the POWER account (e.g. address change, death of a member, receipt of health coverage, etc), refer to Section 3.11.1, Creating, Parking, Forwarding, Getting, and Opening Tasks <insert hyperlink>, and Section 8.4.5.12, Processing an Application WI Part II, Initiate Reported Change Task <insert hyperlink> for instructions to create a task from within the case and forward the Reported Change task to the appropriate queue, .
10.	Click *Tasks* from the left Navigation bar.
	O Expenses O Notes O Correspondence O Tasks O Case Clues O Related Cases O Health Screening Questionnaires
	• The WFMS displays the Tasks page.

Step	Information Request from External Party
11.	Click *Task Name* for the Information Request from External Party with an Open status. • The WFMS displays the Task Home.
12.	Under the Options cluster, click *Close Task*.

8.4.3.10   No Signed Release of Information on File

If information has been requested from an external party, but no signed release of information is on file, it may be necessary to respond to the external party and inform the requestor that we are unable to provide a response to their request without a signed release.

Step	No Signed Release of Information on File

Step	No Signed Release of Information on File
1.	Attempt to contact the external party via the preferred method (i.e. telephone, mail, or fax). - Inform the third party requestor that we are unable to provide a response to their request without a signed release. - If a signed release is obtained, they need to resubmit the request.
2.	Navigate to ICES. Enter TRAN: CLRC; PARMS: ICES Case Number. NEXT TRAN: CLRC____ PARMS: 3000076384____ **Note**: If an ICES case does not exist, update notes in the WFMS. - Click *Notes* from the left Navigation bar. - The WFMS displays the Notes page. - Click *New*. - The WFMS displays the Create Note page.
3.	Enter case notes regarding the information request from external party. Include the name of the third party requestor, information requested and inability to process the information request due to no signed release on file.
4.	Click *Tasks* from the left Navigation bar. The WFMS displays the Tasks page.

Step	No Signed Release of Information on File
5.	Click *Task Name* or the Information Request from External Party with an Open status. Tasks: HIP CASEENDTHREE - 2000086070 | Task ID	Subject	Priority	Reserved By	Deadline
9000050053	1071 - Information Request from External Party	Medium		12/14/2007 16:15	 • The WFMS displays the Task Home. **Task Home** **Options** Close Task Park Task Forward Task **Subject** 1071 - Information Request from External Party **Details** Task ID: 9000050053 Status: Unreserved Priority: Medium Deadline: 12/14/2007 16:15 Reserved By: Last Assigned: 12/10/2007 16:15 Time Worked: 00:00 [Change] Park Deadline: **Primary Action** **Supporting Information** Case Home Page **Task Instructions** Provide information to an external party (e.g. client, authorized rep, third party-housing, hospital, etc) after verifying the necessary releases have been obtained/provided.
6.	Under the Options cluster, click *Close Task*. **Family and Social Services Administration** Home **Task Home** navigation • Task Home **Options** Close Task Park Task Forward Task

8.4.3.11   Create Application Case

An application case is manually created in the Service Center only when a significant problem prevents the Document Center from data entering a HIP application.

Since this is an exception process only, Service Center managers will determine how HIP applications that cannot be data entered at the Document Center would be received so that an Application Case can be created. Applications may be scanned and received as non-indexed documents or possibly as New Application Ready for Initial Review tasks. The assumption is that the documents are received as scanned images.

Step	Create Application Case

Step	Create Application Case
1.	From the User Home page, under the My Tasks cluster, view the Task Name and click the *Task ID.*
2.	Review the Task Subject and Task Instructions:
3.	Click *Non-Indexed Documents* in the *Supporting Information* section.

Step	Create Application Case
4.	The Non-Indexed Documents screen is displayed. Click the Document.

Step	Create Application Case
5.	An image of the Application opens in a separate window; leave this window open in order to create the application case.

Step	Create Application Case
6.	Click *Home* in the upper right hand corner of the screen to navigate to the User Home page..
7.	From the ACS User Home page, click *Create Application Case.*

Step	Create Application Case
8.	Complete the information on the *Create Application Case* screen*.*

- To complete the AR and AE processes in ICES, the county and township must be entered in the WFMS Application Case.

- If unknown, the county and/or township may be obtained by using the Township Locator in the OPS Tool or using the Census Bureau website – http://factfinder.census.gov/servlet/AGSGeoAddressServlet?_lang=en&_programYear= 50&_treeId=420 <insert hyperlink>.

Note: Required fields are marked with a red asterisk.

Step	Create Application Case
9.	Under the Participant Home Address cluster, click the *County* drop down box. Select the county associated with the participant's home address.
10.	Under the Participant Home Address cluster, using the drop down box, select the township associated with the participant's home address.
11.	Once all information has been entered, click *Save*. • The WFMS displays the Application Case Home page.

Step	Create Application Case
12.	Review the image of the application to determine if the application is valid according to policy. Valid applications must contain a name, address, and signature. • If an application is invalid, follow steps in Section 8.4.3.6, Invalid Application Contains Name and Address But No Signature <Insert Hyperlink> and Section 8.4.3.7 Invalid Application Contains Name and Signature But No Address <insert hyperlink>. • If the application is valid, continue with the next step.
13.	Click *Members* from the left Navigation bar. O Documents O Members O Authorized Representatives • The WFMS displays the Members page.
14.	Click *View* next to the member. • The WFMS displays the View Member Details page.

Step	Create Application Case
15.	• Click *Edit*. navigation View Member: complete screen - 9000032777 Edit Delete Close **Applicant Information** recent items First Name: complete Last Name: screen Middle Initial: Suffix: SSN: 674-99-5689 Date of Birth: 1/1/1970 Sex: Female Ethnicity: Hispanic or Latir Email Address: Is this Person Head of Household?: Yes **Applicant's Race - check all that apply** Black or African American: No Native Hawaiian or Pacific Islander: Yes Asian: American Indian or Alaskan Native: No White: No Other: **Programs Requested For This Person** All Programs: No Health Coverage: Yes Not Applying: Food Stamps: No Cash Assistance: No **Applicant Details** Is this Person a U.S. Citizen?: Yes Is this Person a resident of the State of Indiana?: Yes If not a U.S. Citizen, what is their USCIS #?: If not a U.S. Citizen, what is their immigration status?: Country of Origin: Immigrantion Status Date: Date of Entry Into US: • The WFMS displays the Modify Member page. Enter all available information contained on the application but not yet entered in the WFMS (i.e. SSN, DOB, etc.) in the data fields. Once all information has been entered, click *Save*. • The WFMS displays the View Member page. Click *Close*. • The WFMS displays the Members page.
16.	If there are additional members to be added, click *Add Member*. The WFMS displays the Add Member page. FSA Family and Social Services Administration navigation O Home O Expedited Food Stamps O Documents O Members O Review Application Checklist O Authorized Representatives O Member Relationships Members: complete screen - 9000032777 Add Member Action Name Type View|Edit complete screen Primary Client If no additional members are to be added, skip to Step 19.
17.	• Complete all information for the next member to be added. Once all information has been entered, click *Add*. • The WFMS displays the Members page. • To Cancel the Add Member, click *Cancel*. • The WFMS displays the Members page.
18.	Repeat Steps 14-17 until all individuals on the application have been added to the Application Case.

Step	Create Application Case
19.	Determine if the applicant has an authorized representative.
	Note: There is no field on the HIP application for an applicant to designate an authorized representative, so it is important to review the application and documents submitted with it to determine if the applicant is making such a designation.
	• If there is no authorized representative to be added, skip to Step 22.
	• If there is an authorized representative designated, go to the next step.
20.	Click *Authorized Representatives* from the left Navigation bar.
	• The WFMS displays the Authorized Representatives page.
21.	If the applicant has designated an authorized representative, click *New*.
	• The WFMS displays the Authorized Representative page.
22.	Enter all available information in the data fields for the authorized representative.
	• Once all authorized representative information has been entered, click *Save*.
	• Click *Save & New* if more than one Authorized Representative is to be added.
23.	Review the images of the application to verify the images are legible and in the correct order.
	• If the image of an application is not legible, click *Rescan Application* under the Options cluster.
	• If the pages of an application are not in the correct order and therefore need to be rearranged, refer to Section 8.4.5.3, Processing a HIP Application WI Part II, Initiate Rearrange Document Task <insert hyperlink>.

Step	Create Application Case
24.	Under the Details cluster, compare the file date in the WFMS with the earliest date stamp on the application to verify the file date has been or data entered correctly in accordance with policy. The file date is the earliest of: • The date stamped by the State office or Help Center on the application, make sure to check all pages for the date stamp for the date of application. • The date the application is received via fax at the Document Center. • The date the application is received via mail at the Document Center. For HIP applications received from an enrollment center, the file date is the date of receipt at the enrollment center. This is shown at the bottom of page One in the field labeled Date of Application. • If the file date is not correct, click *Documents* from the left Navigation bar. • The WFMS displays the Documents page. Click *Edit* next to the application. • The WFMS displays the Edit Document Details page where the file date is to be corrected. • Once the correct file date has been entered, click *Save*. • Be sure to include the reason for modifying the file date in the case notes. • The WFMS displays the Application Case Home page.
25.	Click *Home* in the upper right corner. • The WFMS displays the User Home page.
26.	Refer to Section 3.11.3, Search Instructions <insert hyperlink> for instruction to search for an active or pending case according to clearance procedures.

Step	Create Application Case
27.	Click *Person* under the Search For cluster. • The WFMS displays the Search Person page.
28.	Enter the Search Criteria for household member #1.
29.	Click *Search.* • The WFMS populates the Search Results cluster based on the search criteria entered.

Step	Create Application Case
30.	• Review the search results to determine if any of the individuals on the application are in another case with either a pending or open status. • If no pending or open application or case is found, skip to step 34. • If any of the individuals on the application are in another case, determine whether the application is either an Add a Program or Add a Person application. **Note:** If the case is an Add a Program, then a separate application has to be completed as HIP cases are kept separate from all other programs. If it is an Add a Person, check to see if the person is requesting HIP also. If the person is requesting HIP, the person should have her own case created, not added to the currently open case. The exception is that if the person is the spouse of a HIP recipient; if so, add the spouse to the existing HIP case. If the individual is just moving into the household and does not want HIP, then follow the steps for adding a new household member in Section 8.4.3.2, Processing a HIP Application WI Part I, Add Member.<insert hyperlink> • Click *Review Application Checklist* from the left Navigation bar and mark the appropriate box.
31.	If more than one household member is listed on the application, but is not applying for HIP, click *Reset* to enter the next member's information. • Repeat Steps 28-30 for each household member. • If any other individual on the application is applying for HIP, go to Step 32. • If there are no other household members or all members have been added, skip to Step 33.

Step	Create Application Case
32.	• If the individual on the application is also applying for HIP, then a new Application Case must be created for that person. • Each individual will have her own WFMS Application Case, Standard Case and ICES Case if she is on HIP, even if they live in the same household. The exception is that if the individuals are spouses; if the individuals are spouses, they will be on the same case. • Return to the beginning of Create an Application instructions to create a new case for the other household member applying for HIP.
33.	Compare all information on the Application Case Home page with the application, verifying that the information has been data entered correctly.
34.	Link the HIP application to the case, following steps (beginning with step 12) for linking non-indexed documents in 3.11.2.2 Non Indexed Documents Received <insert hyperlink>.
35.	Click *Home* from the left Navigation bar. • The WFMS displays the Application Case Home page.
36.	From the Application Case Home page, under the Options cluster, click *Send AR Information to ICES.*

Step	Create Application Case

- The WFMS displays a confirmation page.

- Click Close.

37. Navigate to ICES. Enter TRAN: ARLD; PARMS: WFMS Application Number. Press **Enter.** The WFMS Application Number can be found at the top of the Application Case Home page.

38. The WFMS pushes the application information through the AR driver flow in ICES.

39. Complete subsequent application registration screens.
- If the WFMS pushes all Application Registration information with the AR Driver Flow stopping at ARAS, skip to Step 43.

Step	Create Application Case
40.	Complete screen ARIS – Individual Statewide Clearance List. ARIS displays when potential matches are found.

```
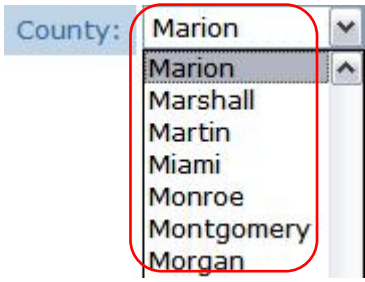ARIS              INDIVIDUAL STATEWIDE CLEARANCE LIST    07/12/07 08:54
COUNTY: 49   APPL NBR: 3000349179   WORKER: T49704          T49704 A TEST/ROGER
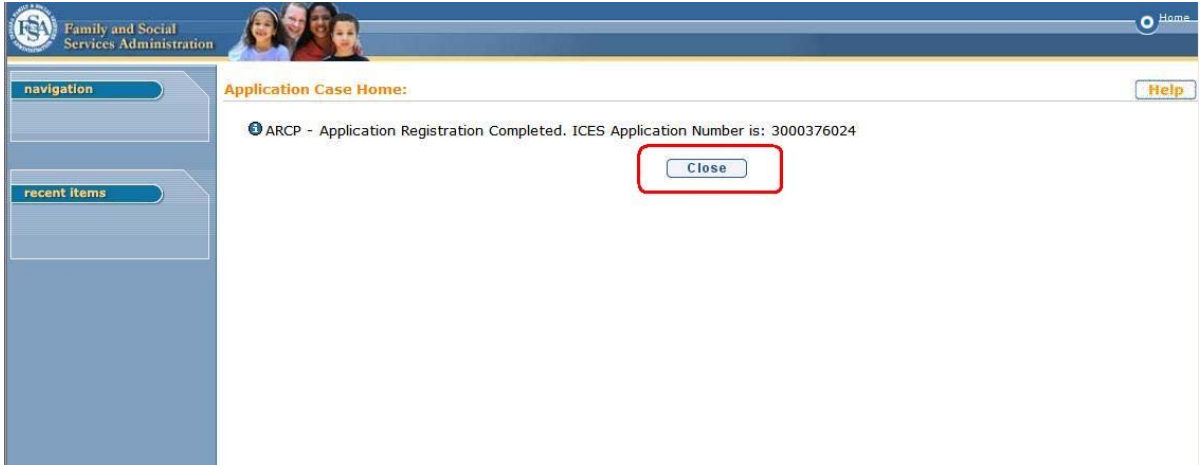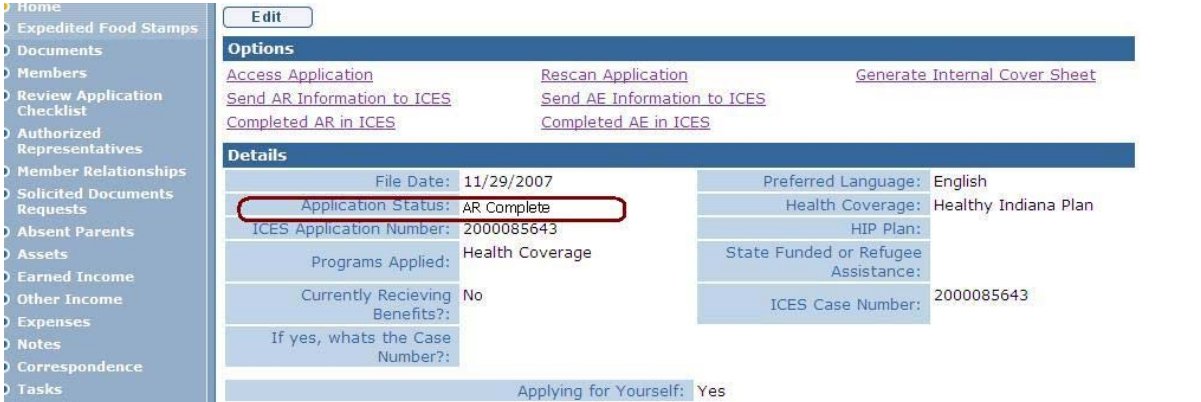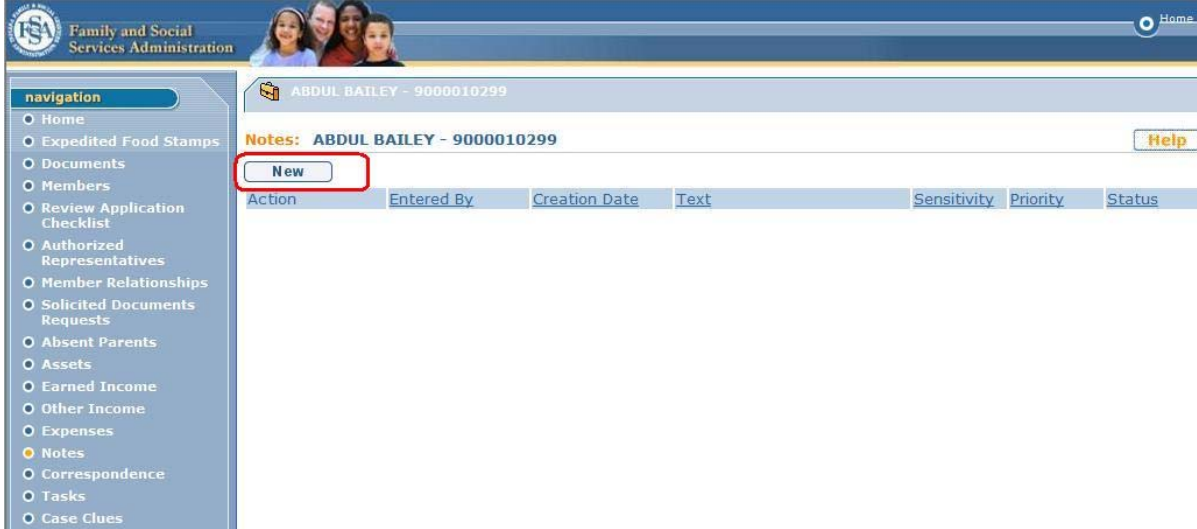
    SSN        FIRST      MI     LAST      SUF    DOB      S  R
308945688   PEYTON            MANNING               05031974  M  W
                                                                 ICES ALIAS
S   RID/SSN         FIRST      MI    LAST      SUF    DOB     S R ST CO   SCORE
_    300020553 PEYTON             MANNING              05011974 M W A  49    76
_    311700004 PEYTON             MANNING              01011970 M W I  72    61
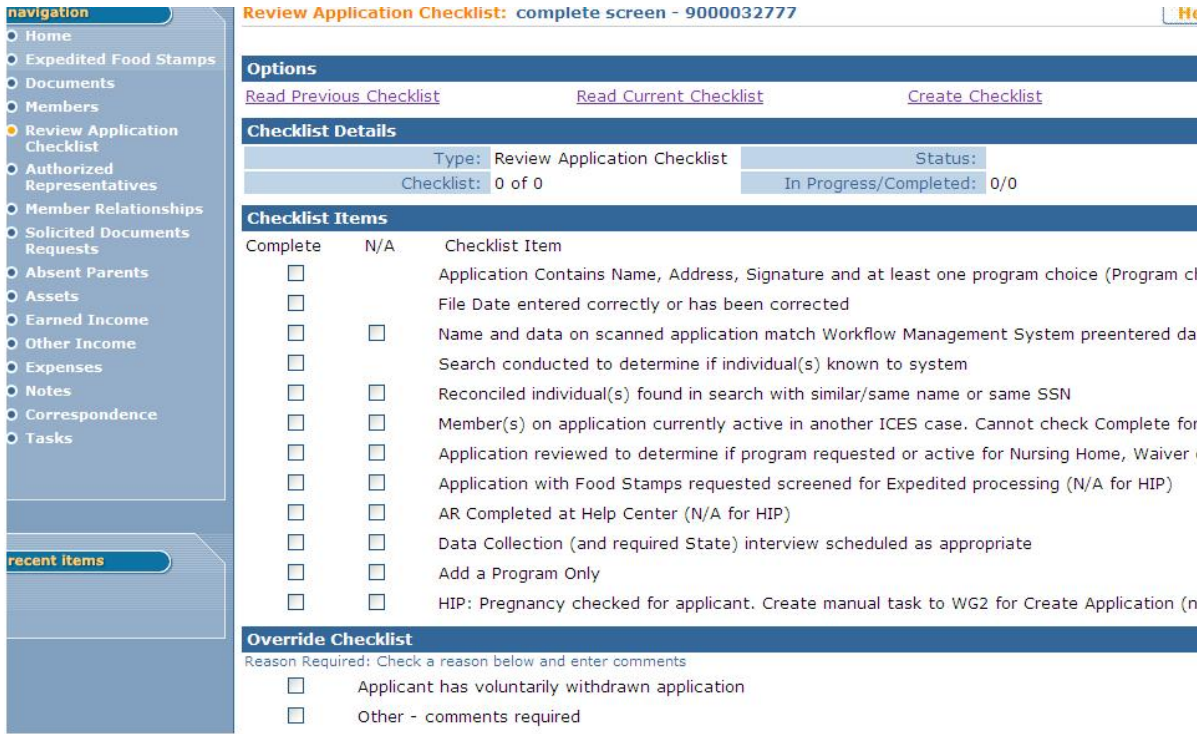
















PF17: ARIR  (NO SELECT); PF20: TOP OF LIST; PF22: NEW INDV; PF23: AEIPC
NEXT TRAN: _____   PARMS: _____
```

- For an exact match, place an "X" in the select column and press **Enter**. The next individual displays and the same process is repeated until all individuals have been cleared.

- If demographic data contained in ICES is different than demographic data contained on the application, reconcile the information to allow for completion of the application registration process without creating a duplicate RID. Be sure to include any incorrect demographic data in case notes to inform the next worker to make any required demographic corrections.

- If the individual is not known to ICES, press **PF22**. An edit appears at the bottom of the screen. To confirm the individual is new, enter "Y" and press **Enter**.

```
PF22 - NEW INDV, ARE YOU SURE ?, PLEASE CONFIRM:    _   (Y/N)
```

Step	Create Application Case
41.	Complete screen ARCR – Statewide Clearance Results. ARCR displays the results of the individual clearance process for all applicants. **DO NOT SELECT A PREVIOUS CASE ON ARCR**. Press **Enter**. ``` ARCR STATEWIDE CLEARANCE RESULTS 09/26/07 16:26 COUNTY: 1 APPL NBR: 3000376024 WORKER: T49704 A TEST/ROGER CASE NBR: SCREENER: T49704 CURR/LAST CLEAR RSN SEL FIRST MI LAST SUF SSN KNOWN CASE ST FH STAT CDE ABDUL BAILEY 0 N NEW PF16: ARAD PF17: ARIR PF18: ARIS PF20: TOP LIST PF21: RESET CASE NEXT TRAN: _____ PARMS: _____ ``` • If an individual fails clearance, refer to File Clearance Failure Reason Codes by entering TRAN: RFDI; PARMS: TSCF. Resolve clearance issues and continue. ``` ARCR STATEWIDE CLEARANCE RESULTS 12/13/07 09:22 COUNTY: 27 APPL NBR: 2000088753 WORKER: T49709 A REFM/BIPPE CASE NBR: SCREENER: T49709 CURR/LAST CLEAR RSN SEL FIRST MI LAST SUF SSN KNOWN CASE ST FH STAT CDE COMPLETE SCREEN 309925689 0 N NEW ```

Step	Create Application Case

42.	View screen ARPC – Prior Contacts List. ARPC is an informational screen. Press **Enter**.
	
	``
	ARPC PRIOR CONTACTS LIST 09/26/07 16:29
	COUNTY: 01 APPL NBR: 3000376024 T49704 A TEST/ROGER
	
	INDIV NUM FIRST MI LAST SUF SSN DOB S R
	300080284799 ABDUL BAILEY 08061972 M B
	
	      PROGRAMS IDENTIFIER STATUS BEGIN END COUNTY
	      APPLCN REGISTRATION 3000376024 PEND 09/26/07 01
	
	NEXT TRAN: _____ PARMS: _____
	``

43.	Complete screen ARCP – Choice of Programs. ARCP is pre-filled with choice of programs for each member. Press **Enter**. **Note:** Since this is a new HIP Application, then the only program choice should be an "H" under Medical. If any other programs are marked or Medicaid is marked with an "N" or "Y" then the application needs to be completed by someone in a non-HIP New Applications work queue. ``` ARCP CHOICE OF PROGRAMS 12/12/07 11:31 COUNTY: 27 APPL : 2000087821 WORKER: T49709 A REFM/BIPPE LAST ACTIVITY DATE: 12/05/07 STATUS: CASE ALL LISTED INDIVIDUALS APPLY FOR CASH, MEDICAL, FS: _ INDIVIDUAL CASH,MEDICAL,FS CASH MEDICAL FS MA ENROLL 1 HIP R _ N H N N ```

Step	Create Application Case
44.	Under the Options cluster, click *Completed AR* in ICES. • The WFMS displays a confirmation page. Click *Close*. The Application Home Page is displayed with the Application Status of AR Complete.
45.	Click *Notes* from the left Navigation bar. • The WFMS displays the Notes page.

Step	Create Application Case
46.	Click *New*. • The WFMS displays the Create Note page.
47.	• Enter case notes regarding the application review and registration process. • Include application date; file clearance issues, demographic information that needs to be reconciled during AE, and any actions taken or information pertinent to the continued processing of the application. • Once all notes have been entered, click *Save*. • The WFMS displays the Notes page with the newly added note.
48.	Click *Review Application Checklist f*rom the left Navigation bar. • The WFMS displays the Review Application Checklist page.

Step	Create Application Case
49.	Mark the appropriate boxes on the Review Application Checklist. • If the applicant has voluntarily withdrawn the application or if there is another reason to override the checklist, mark the appropriate box and enter comments (if necessary). Marking this box forwards the appropriate task to the appropriate Workgroup.

Step	Create Application Case
50.	Once all applicable items have been marked on the checklist, click *Save*. • The WFMS creates and forwards the appropriate task to the appropriate Workgroup.
51.	Click *Tasks* from the left Navigation bar. • The WFMS displays the Tasks page with the task "Process New Application-Health

Step	Create Application Case
	Coverage" generated as a result of the completion of the Review Application Checklist.
52.	• Click *Home* in the upper right corner. • • The WFMS displays the User Home page.
53.	Under the My Tasks cluster, click the Task ID. • The WFMS displays the Task Home page. Close the task.

8.4.3.12   ICES Failure Messages

Instructions to be included to resolve problems with the push from the WFMS to ICES.